EXHIBIT B

UBER_JCCP_MDL_003405397

Metadata

#Author	matt.shroder@uber.com	SEMANTIC
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Trial Exhibit No.

P-00176

Global
Driver
All Hands

December 13, 2017
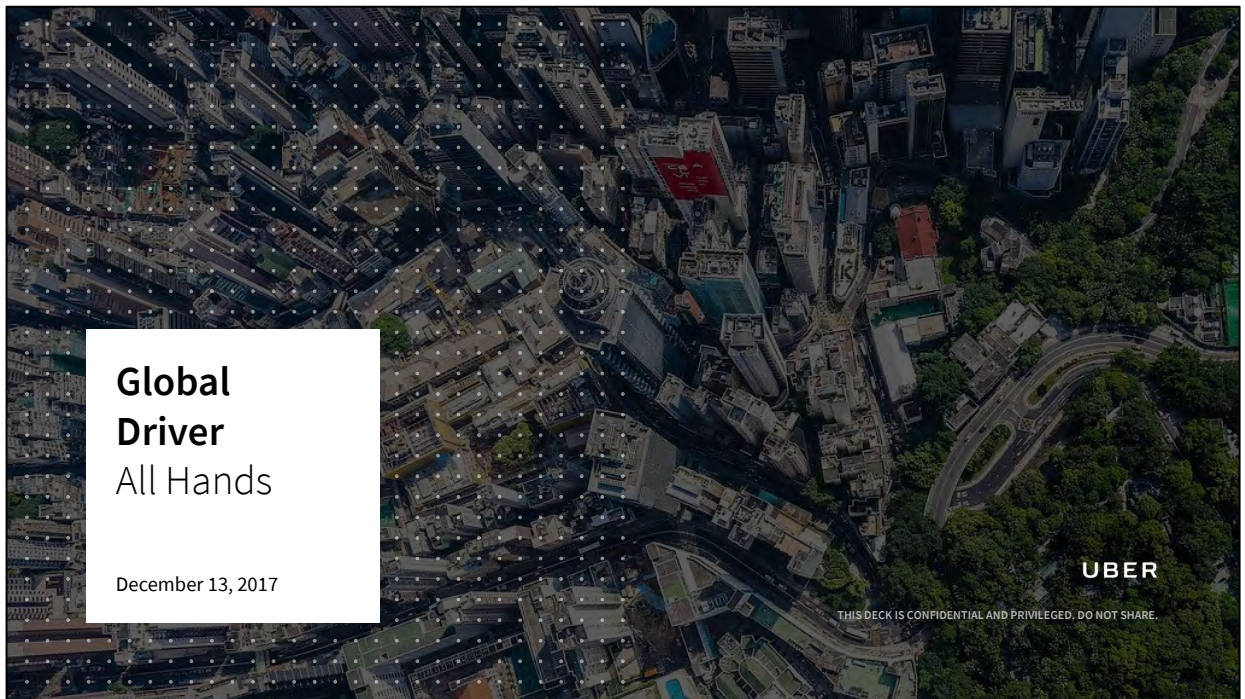
UBER

slido.com:
#globaldriver

Vision & History

DRIVER VISION

Uber is the world's favorite **flexible earnings opportunity**

For years, **GROWTH >**
everything else

Rider demand was rampant.

Capital was cheap.

"Supply" was our constraint.

We met demand through aggressive spending on driver acquisition and existing driver incentives to maximize hours.
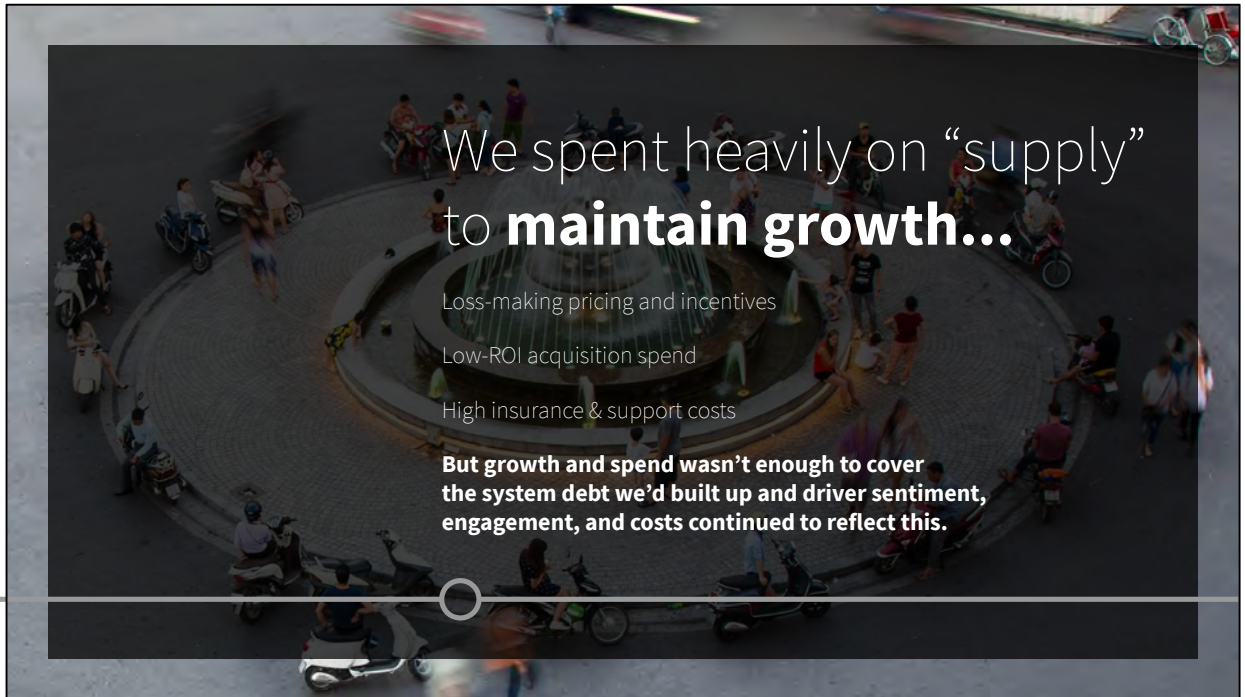
Driver satisfaction
declined.

The drivers we were able to attract expected higher earnings than the opportunities we could profitably offer.

We neglected the basics of the driver experience.

We failed to honor loyalty with loyalty.

We spent heavily on "supply" to **maintain growth...**

Loss-making pricing and incentives

Low-ROI acquisition spend

High insurance & support costs

But growth and spend wasn't enough to cover the system debt we'd built up and driver sentiment, engagement, and costs continued to reflect this.
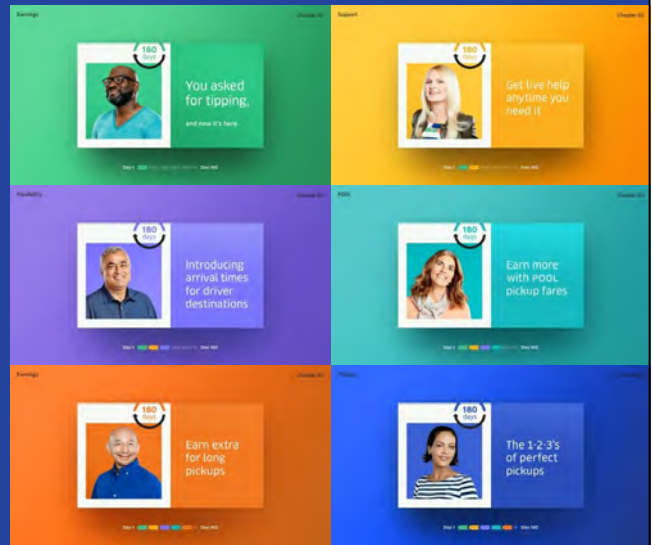
2017 was a year of **listening and change.**

As driver sentiment declined, and the brand slipped into crisis, we shifted focus strongly to improving our relationship with our existing drivers.

>6% Lift in US Driver Sentiment Since Launch
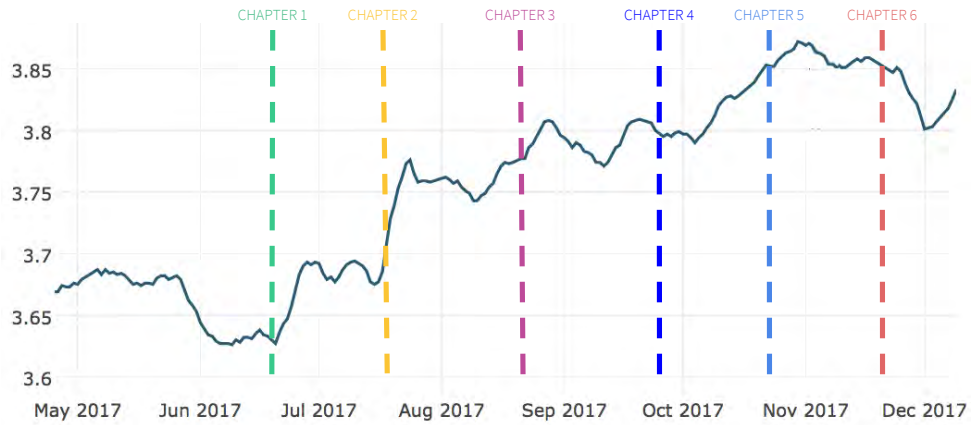
But despite our significant 2017 improvements, **the underlying driver system debt remains a threat and opportunity for our business.**

Enter…

Driver Forward, 2018

the global cross - organizational / functional system
through which we'll execute our 2018 Driver Strategy.

In 2018 our task is to move beyond 2017's pure focus on driver sentiment to build and strengthen the system that offers enduring opportunity to millions of drivers around the world.

3 core tenets of
FORWARD

1. Customer-centric

2. Strategic

3. As One

This work - it sound so simple but the three things we did that we at scale, orienting across the customer, strategy genuinely based in insights, and operating as an fully customer based organization

Driver Forward
2018 Steering Committee

Andrew Macdonald
VP RGM LATAM & APAC

Rachel Holt
VP RGM US&C

Manik Gupta
Sr. Director, Product

Billy Guernier
Head of Central Ops, US&C

Tom Fallows
Director, Product

+++

Full Steering Committee to be finalized by EOY

Ushering in a new year - key additions - Mac (Global) and Manik (marketplace) - cross functional - we'll keep adding right folks

How we organize...

Pillars

Pillars

Big Rocks

Big Rock

Big Rock

Big Rock

Projects

Project 1:

Project 2:

Project 3:

Old news, oriented around pillars, big rocks, projects

Strategic Organization...

Insights	Strategy	Planning	Execution
Big Picture	Vision	Roadmaps & OKRs	
Driver Audience	Core Strategy	Campaigns	
Marketplace Dynamics	Value Proposition		
Driver Earnings	Pillars & Big Rocks		
Driver Experience & Relationship	Measuring Success		
Rider Experience			
Spend Efficiency			
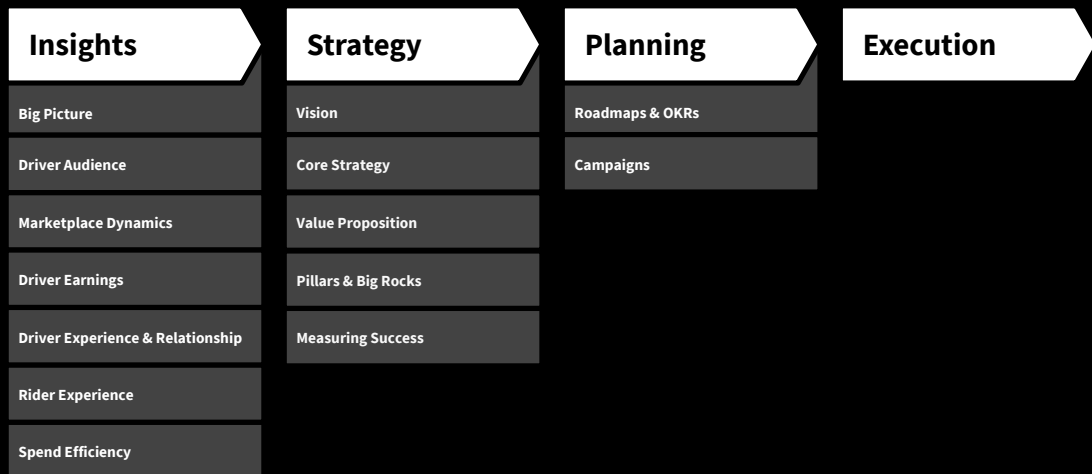
Continuation of what we did last year, focusing on insights, strategy, leading to planning and execution

Insights

Our 2018 strategy is grounded in insights:

Big Picture

Driver Audience

Marketplace Dynamics	Driver Earnings	Driver Experience & Relationship	Rider Experience	Spend Efficiency

Results

INSIGHTS | STRATEGY | PLANNING | EXECUTION

INSIGHTS
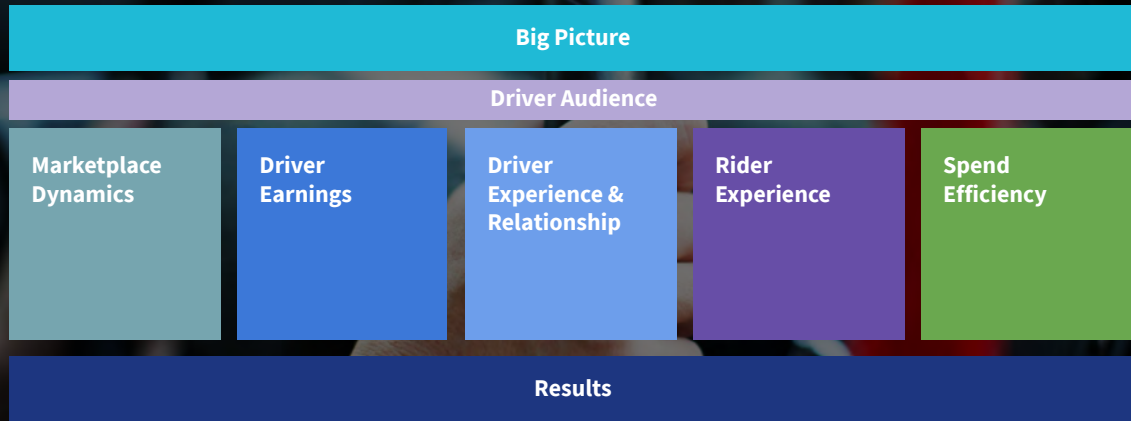
Big Picture

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Big Picture: Room to Grow
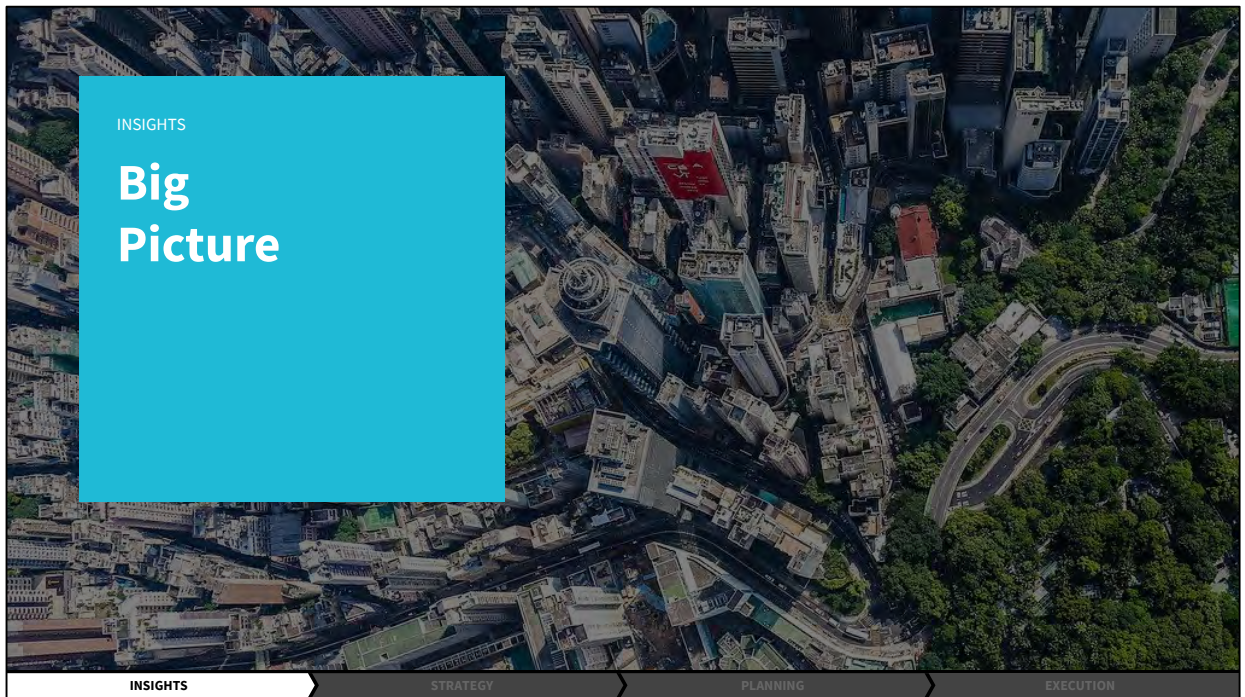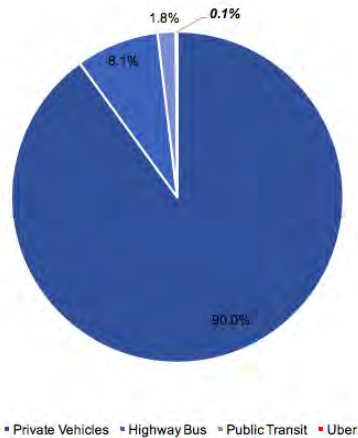
We still provide only a tiny percent of the world's overall vehicle trips.

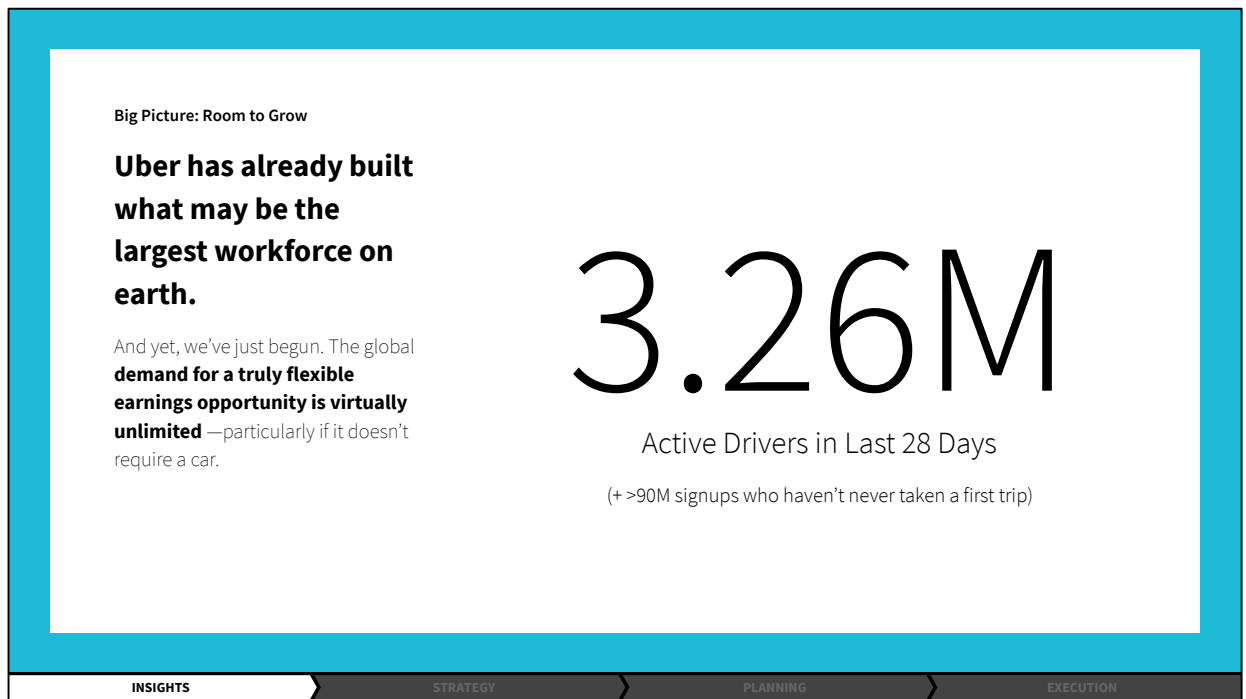Composition of Passenger Miles by Road Transportation Mode

1.8%   0.1%

8.1%

90.0%

■ Private Vehicles   ■ Highway Bus   ■ Public Transit   ■ Uber

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Big Picture: Room to Grow

Uber has already built what may be the largest workforce on earth.

And yet, we've just begun. The global **demand for a truly flexible earnings opportunity is virtually unlimited** —particularly if it doesn't require a car.

3.26M

Active Drivers in Last 28 Days

(+ >90M signups who haven't never taken a first trip)
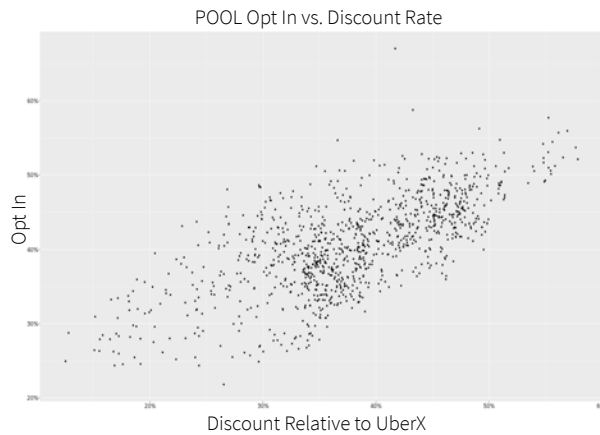
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

91M signups in funnel.. Some duplicative and have other challenges.
Very very large part of population is somewhere in our funnel and needs our help solving structural challenges to begin driving.
Even today takes a while to begin earning -- e.g., in SF it's 3 weeks, in licensed markets it's even higher
Many blockers - vehicle ownership, document knowledge & acquisition challenges, regs stuff, unbanked, nervousness pre FT

Big Picture: What Matters

Lowering trip price has been the primary way we grow, historically.

However, our ability to do this on UberX is relatively limited. **Shared rides is by far our most compelling near-term bet to unlock the next wave of growth.**

POOL Opt In vs. Discount Rate

Opt In

Discount Relative to UberX
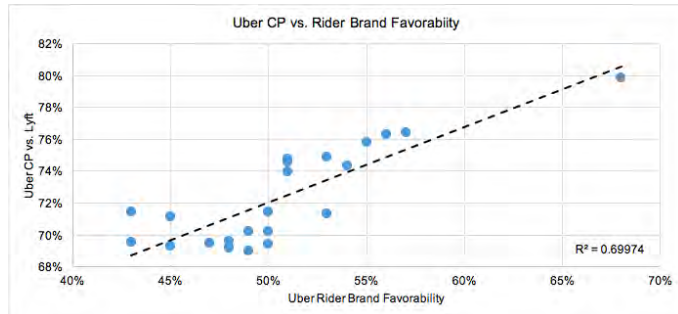
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: What Matters

Brand matters. A lot. Particularly when the product is not differentiated.

We have the opportunity to tell a true turnaround story.

Drivers are our moral compass.

Uber CP vs. Rider Brand Favorability
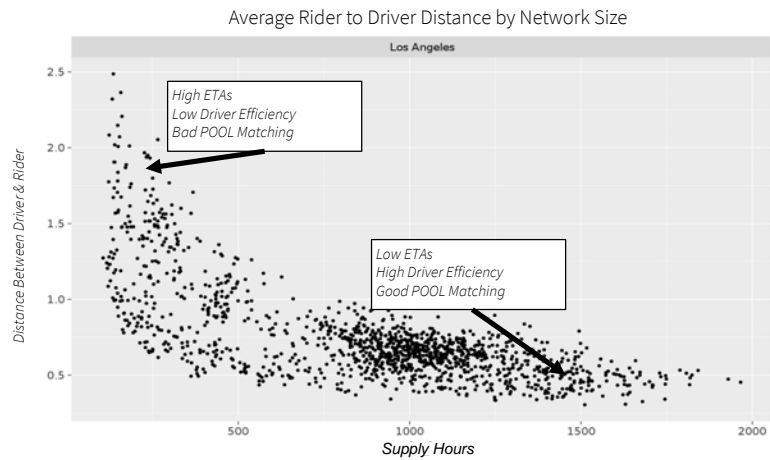
$R^2 = 0.69974$

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: What Matters

Relative Scale is our primary competitive advantage.

Category Position (CP) matters.

Average Rider to Driver Distance by Network Size

Los Angeles

High ETAs
Low Driver Efficiency
Bad POOL Matching

Low ETAs
High Driver Efficiency
Good POOL Matching

Distance Between Driver & Rider
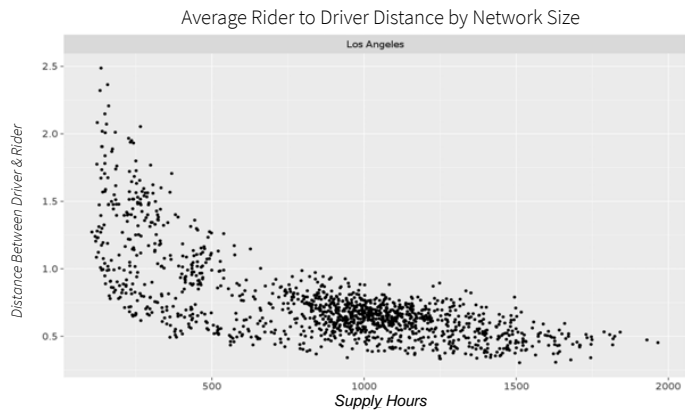
Supply Hours

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Big Picture: What Matters

Why does CP matter?

Category position is the percentage of trips taken on the Uber platform over the total addressable market by geography.

Average Rider to Driver Distance by Network Size

Los Angeles

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: What Matters

Why does CP matter?

Average Rider to Driver Distance by Network Size

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: What Matters

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Big Picture: What Matters

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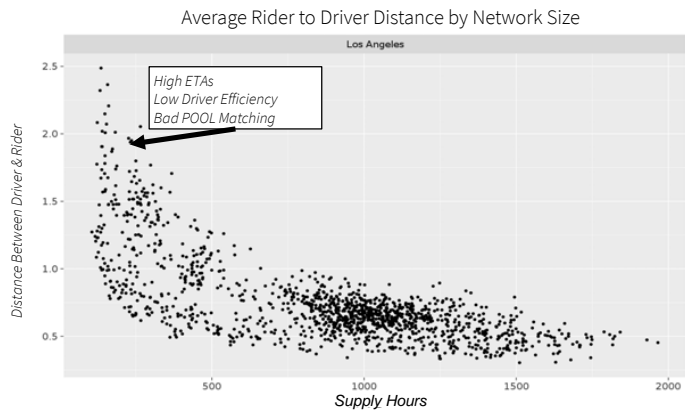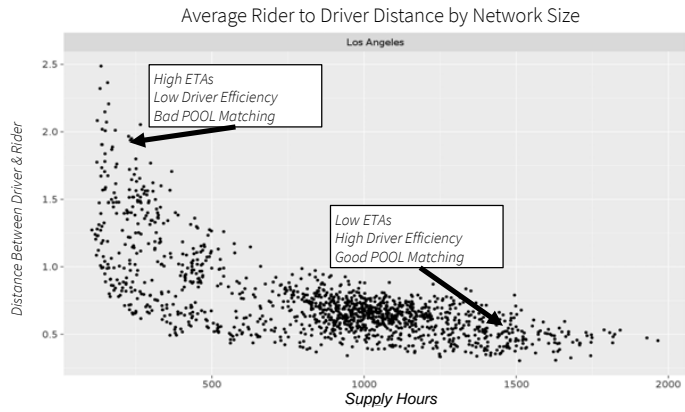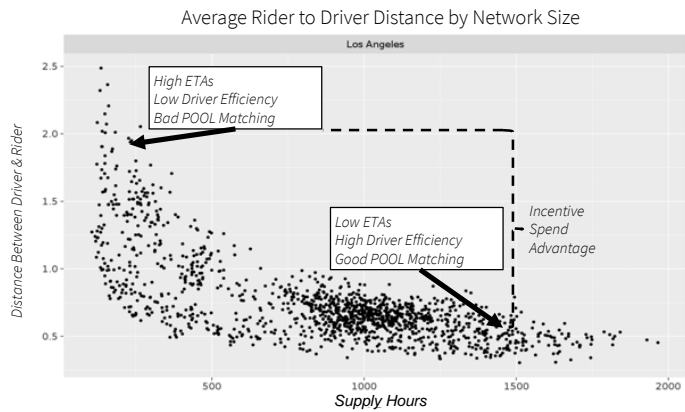
Big Picture: What Matters

When you combine weakness on the fundamentals with brand degradation you get a potentially catastrophic cycle of CP loss.

When fewer drivers are on the platform, ETAs and ETDs rise across the system—giving riders reasons to try another service. And without rider demand, drivers go elsewhere. We have seen this very clearly in the US.

Uber CP vs. Rider Brand Favorabiity

$R^2 = 0.69974$
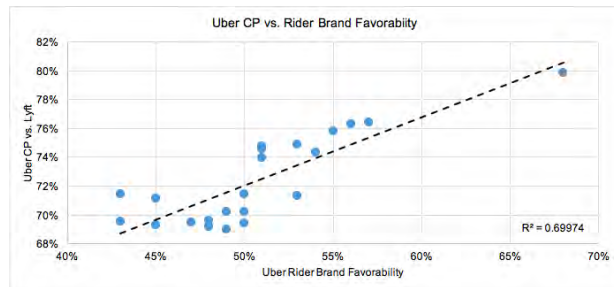
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: Core Truths

Well-funded competition is here to stay.

When riders have bad experiences, they are more likely to switch—even if these experiences only happen occasionally (p90+). **We must partner with drivers to improve network quality, consistently and at the extremes,** to ensure riders don't have a reason to switch.

Propensity of Riders to Try Lyft
by Count of Unfulfilled Requests

No Unfulfilled Requests	At Least 1 Unfulfilled Request
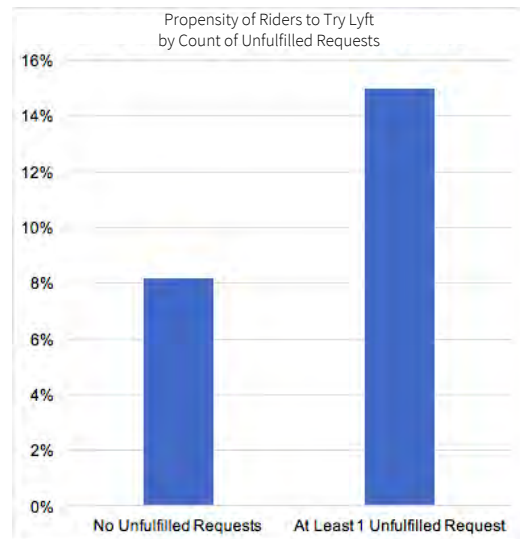
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: Core Truths

UberEats is for real.

More drivers are completing deliveries at a higher rate
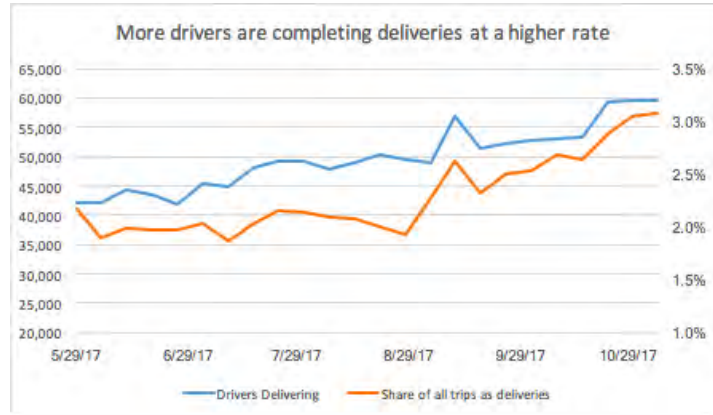
INSIGHTS | STRATEGY | PLANNING | EXECUTION

Big Picture: Core Truths

We serve a truly global driver base with unique international use cases (though the US remains our crown jewel.)

Cumulative Percent of Global GB by Country
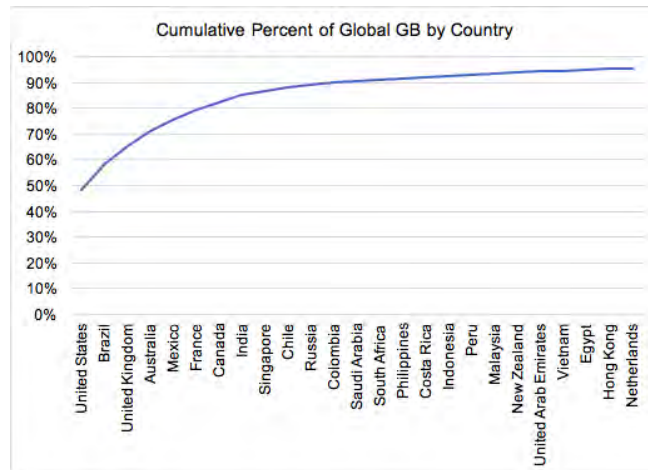
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Big Picture: Core Truths

We are committed to our open, independent contractor model.

INSIGHTS   STRATEGY   PLANNING   EXECUTION
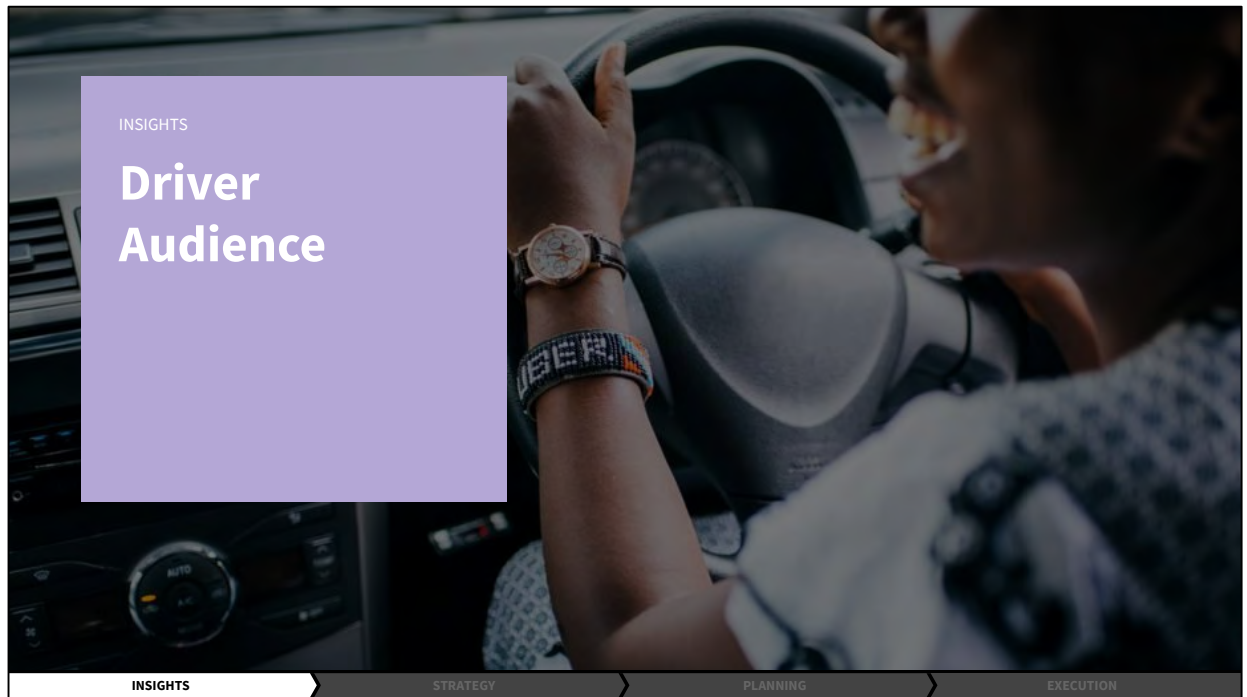
INSIGHTS

Driver Audience

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

91M signups in funnel.. Some duplicative and have other challenges.
Very very large part of population is somewhere in our funnel and needs our help solving structural challenges to begin driving.
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Many blockers - vehicle ownership, document knowledge & acquisition challenges, regs stuff, unbanked, nervousness pre FT

Driver Audience

Driver productivity is highly concentrated. Specific segments of drivers provide the bulk of drivers hours.

U.S. Cumulative Distribution of Trips & Driver Hours by Driver Percentile

The 20% most productive drivers account for 65% of trips & hours

Most Productive Drivers   *Least Productive Drivers*

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50% 55% 60% 65% 70% 75% 80% 85% 90% 95%

—— Percent of Trips   —— Percent of Hours

Chart Data from US Q3 2017
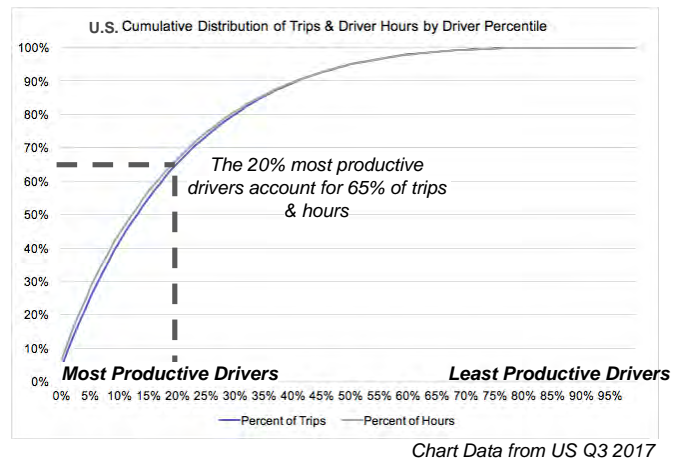
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

This holds across most geographies
This is a critical insight that we should all bear in mind as we think about prioritization of resourcing (product, investment, support, everything)
Then a key question is who are these folks?

P-00176.00038

Driver Audience

Veteran drivers—both full- and part-time—are our most valuable partners.

And driving consistently is key.
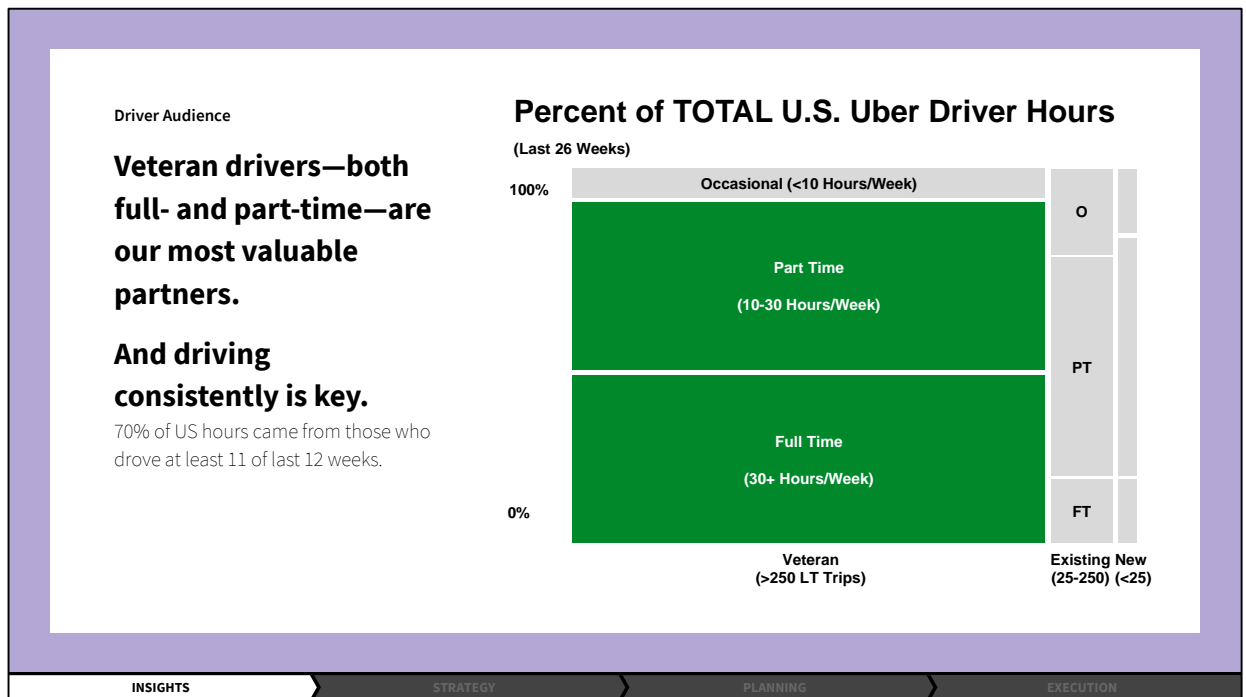
70% of US hours came from those who drove at least 11 of last 12 weeks.

Percent of TOTAL U.S. Uber Driver Hours

(Last 26 Weeks)

100%	Occasional (<10 Hours/Week)
	Part Time (10-30 Hours/Week)
	Full Time (30+ Hours/Week)
0%	

O

PT

FT

Veteran
(>250 LT Trips)

Existing New
(25-250) (<25)

INSIGHTS	STRATEGY	PLANNING	EXECUTION

82% of hours supplied by Veteran drivers
Note that consistency is the most critical piece here.. Part time and Full Time, once consistent, contribute equal parts of this 82%
As an example, if you look at the last 12 weeks in the US, 70% of hrs are being contributed by drivers that drove atleast 11 of the 12 weeks
Our #1 priority is ensuring we are able to retain these drivers and win their loyalty; after that comes driving higher engagement from other folks and moving ppl through funnel etc.

Driver Audience

In the US, our most productive driver demographic is 35-64 year old men who reside in cities or suburbs and earn between $25k and $75k per year.

% Drivers by age group
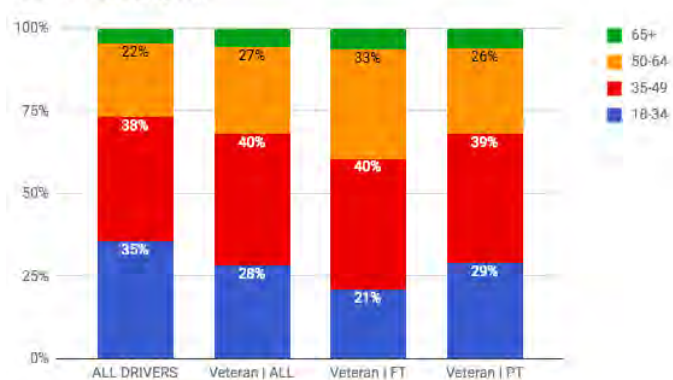
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Drive significantly more during weekdays than all drivers
These drivers are much more consistent than the average driver
While the majority in the US are Caucasian, these drivers are actually more diverse than the US population.
And we attract a higher representation of African American females than their US demographic proportion.

Driver Audience

46% of drivers typically drive on at least one other ridesharing platform, and these drivers are among our most productive.

US Active Driver - % Drivers Dual Apping with Lyft in Month
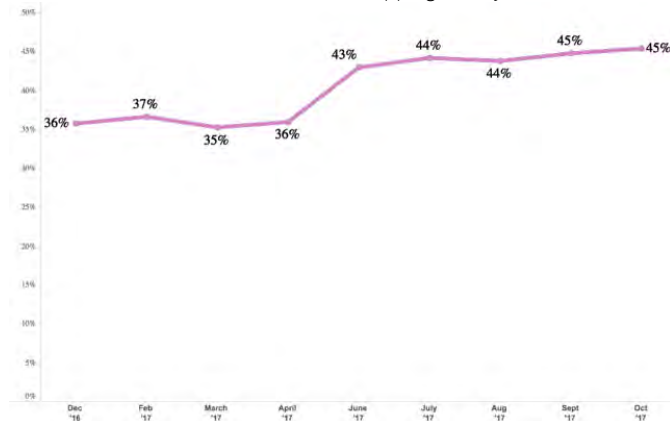
| | INSIGHTS | STRATEGY | PLANNING | EXECUTION |

This trend is pretty applicable globally.. If we look at our CP across most global markets we are losing CP, which inherently implies that more of our customers are dual apping (exception: India)

Driver Audience

Fewer than 30% of our global hours are in the US. The rest of the world has unique barriers to driving— financial and consumer technology, licensing, vehicle ownership, and safety.

% of Monthly Online Hours by Mega-Region

India SC   EMEA   APACX   LatAm   US & Canada
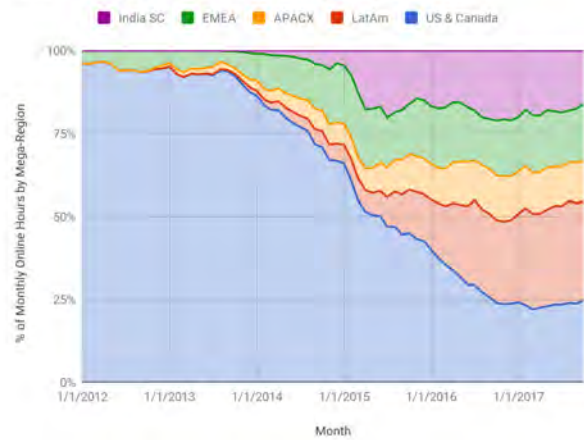
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Audience

Fleet partners provide ~30% of our global driver hours and are concentrated in high-growth regions.

Fleet Supply Hours by Megaregion
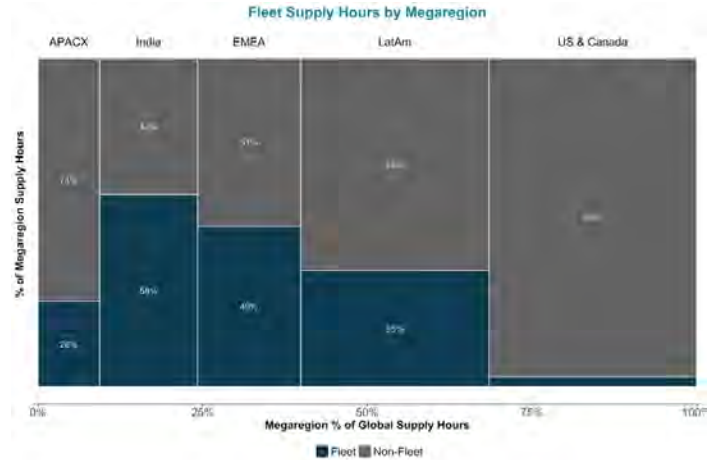
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Audience

Uber Everything is providing more opportunities for drivers, with over 3.5% of global drivers currently transporting food or packages.

More drivers are completing deliveries at a higher rate

Drivers Delivering   Share of all trips as deliveries

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

INSIGHTS

Marketplace Dynamics

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

"Gas prices are going up, yet we're earning the same amount per mile. We need an increase in the per mile rate. Without boost or surge, there is really no point in driving because you don't make enough money."

– Terry

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Marketplace Dynamics

Our network is cost efficient when the right number of drivers are in the right places at the right times. The clearer our market information to drivers, the more efficient we can be.

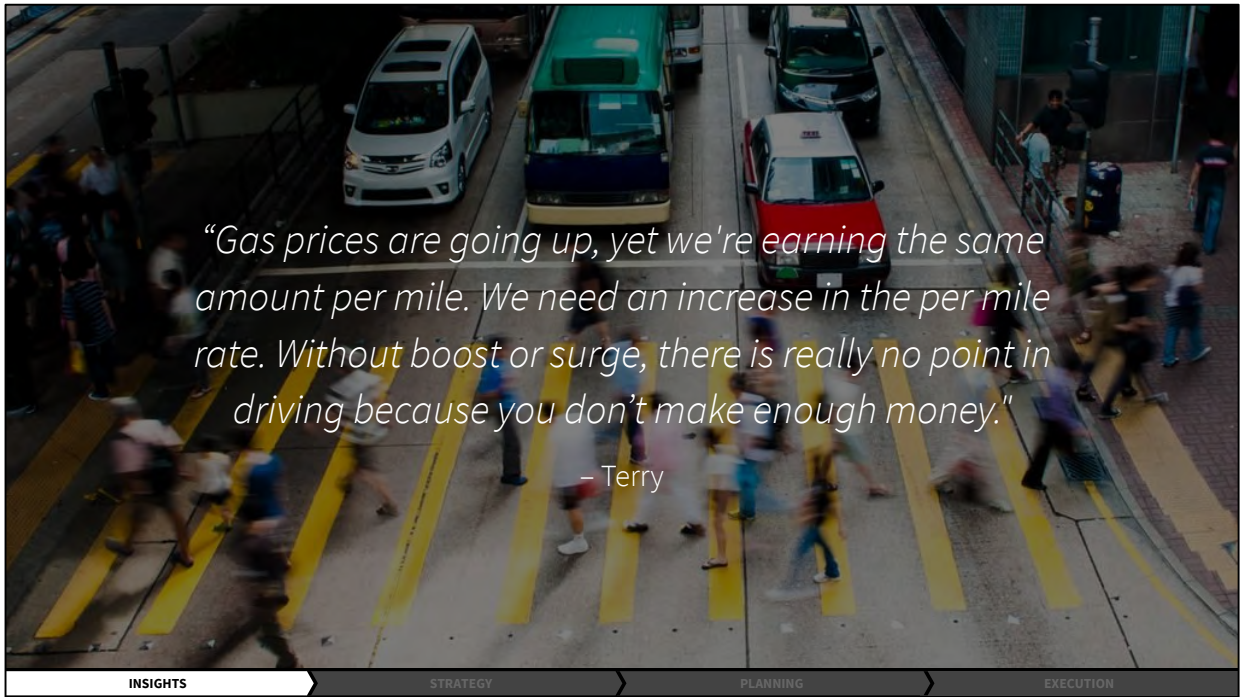Too few drivers, and we lose riders. Too many, and drivers and Uber lose money.

To achieve balance, we must provide information and pricing to **motivate drivers to sign on in advance of anticipated demand, and attract the right mix of full- and part-time drivers.**

London supply / demand distribution

— Percent of Supply   ～ Percent of Demand
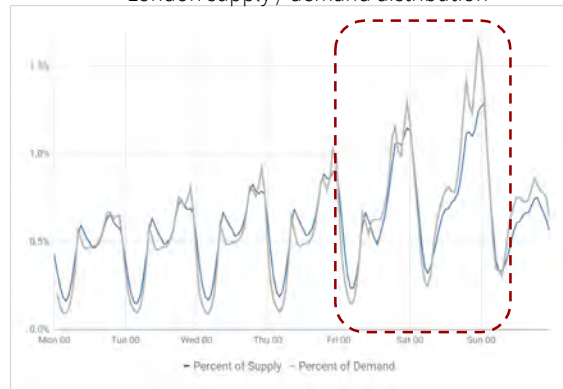
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Marketplace Dynamics

The fundamentals of the rider experience—affordability and low ETA/ETDs—depend on driver engagement, without which we risk potentially catastrophic CP loss.
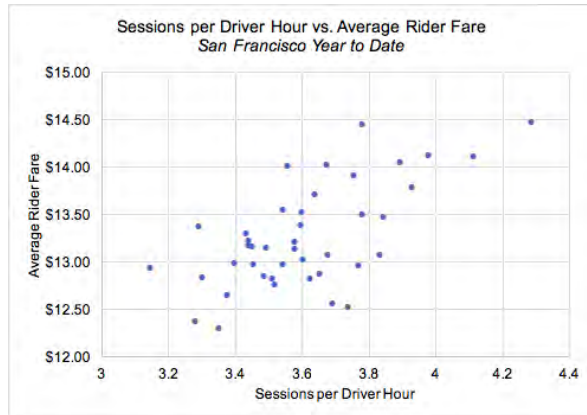

Sessions per Driver Hour vs. Average Rider Fare
San Francisco Year to Date

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Marketplace Dynamics

Our most productive partners are the small core of veteran drivers—both full- and part-time—who drive consistently. And they are dual-apping (US).

Gross Bookings per Hour

Single Apper	$26.57
Dual Apper	$28.60

$25.50 $26.00 $26.50 $27.00 $27.50 $28.00 $28.50 $29.00

Trips per Hour

Single Apper	2.00
Dual Apper	2.15

1.90 1.95 2.00 2.05 2.10 2.15 2.20

Utilization

Single Apper	66.5%
Dual Apper	69.2%

65.0% 65.5% 66.0% 66.5% 67.0% 67.5% 68.0% 68.5% 69.0% 69.5%

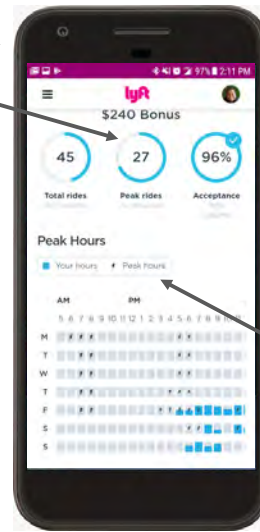INSIGHTS   STRATEGY   PLANNING   EXECUTION

Marketplace Dynamics

Our competitors are attracting highly engaged drivers at peak hours more than we are, notably in the US.

(And they are spending for it. We maintain a strong efficiency and spend gap in the US.)

Peak Ride Requirement for DxGy Structures

Dedicated UI to encourage driving during peak times
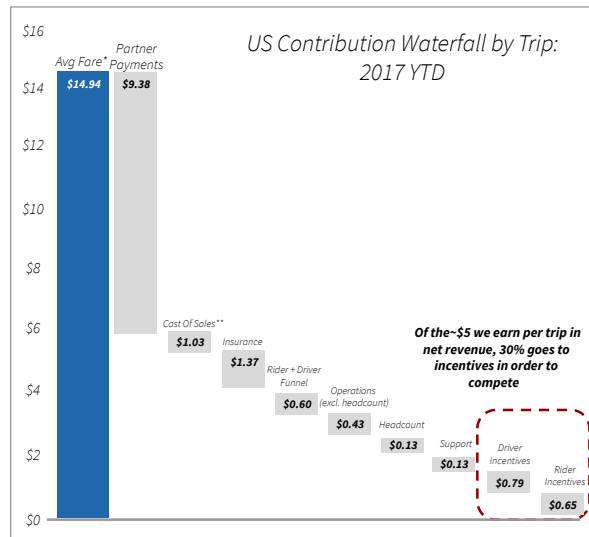
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Marketplace Dynamics

Our current competitive strategy is costly and unstable. Our incentives either don't lock people in, or are expensive to implement when they do.

Our most positive point of differentiation comes from our trip volume; and we are seen slightly less favorably than our competitors among those that drive with both.

US Contribution Waterfall by Trip: 2017 YTD

$16

$14 *Avg Fare* **$14.94** *Partner Payments* **$9.38**

$12

$10

$8

$6 *Cost Of Sales*** **$1.03**

$4 *Insurance* **$1.37** *Rider + Driver Funnel* **$0.60** *Operations (excl. headcount)* **$0.43**

$2 *Headcount* **$0.13** *Support* **$0.13** *Driver Incentives* **$0.79** *Rider Incentives* **$0.65**

$0

Of the~$5 we earn per trip in net revenue, 30% goes to incentives in order to compete
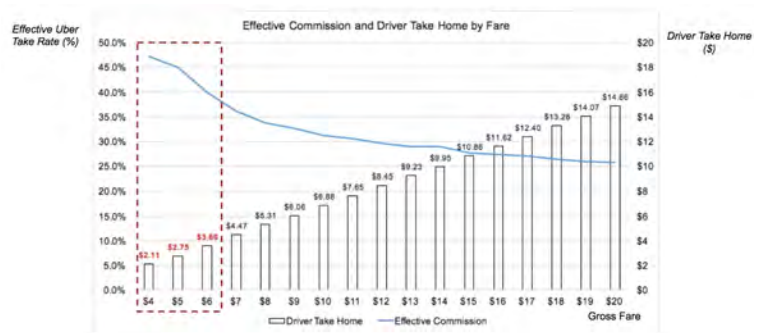
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Marketplace Dynamics

Our pricing model doesn't reflect the costs/benefits to the network.

For instance: driver take-home earnings increase with longer trips.
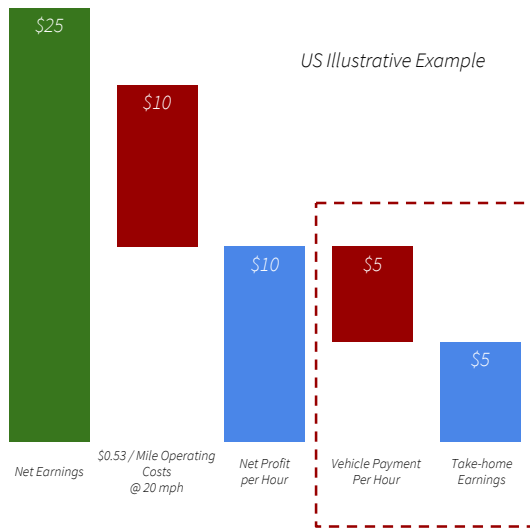

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Marketplace Dynamics

Getting access to a car can be expensive. There is a fundamental mismatch between the promises we make of easy-entry, flexible earnings and the requirement of car ownership.

US Illustrative Example

$25 — Net Earnings
$10 — $0.53 / Mile Operating Costs @ 20 mph
$10 — Net Profit per Hour
$5 — Vehicle Payment Per Hour
$5 — Take-home Earnings

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Marketplace Dynamics

We should focus on serving our high-value core driver segments while also investing in segments that can support sustainable growth in the future. (US-centric slide)

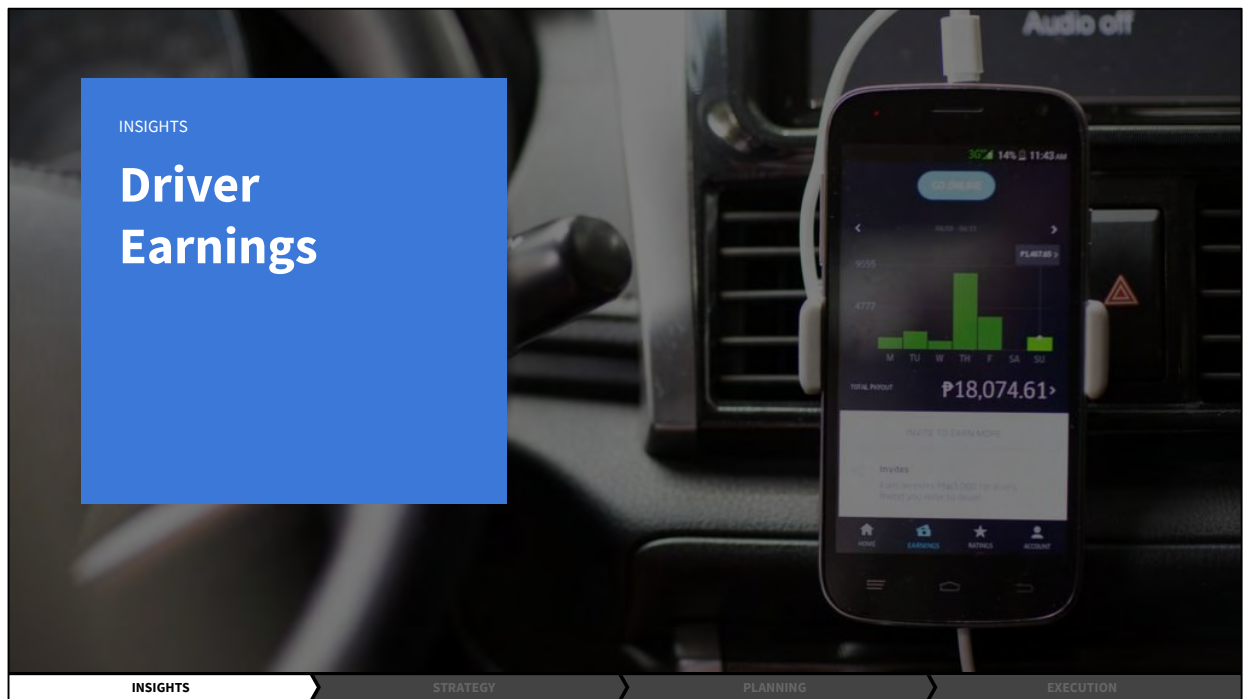|	(1) Serving our high-value core driver base better	(2) Invest in key segments to support sustainable growth
Engagement	Full Time	
	Part Time	
Consistency	Highly Consistent (75%+ Weeks Active)	
Experience	Veteran (>250 LT Trips)	New (<25 Trips)
Demographics		Female

INSIGHTS | STRATEGY | PLANNING | EXECUTION

"My trust for accurate, on-time, and fair payments has completely dried up. I feel forced to sit down at the end of each evening to calculate all my trip distances, times, and payments to ensure Uber is paying me as owed. "
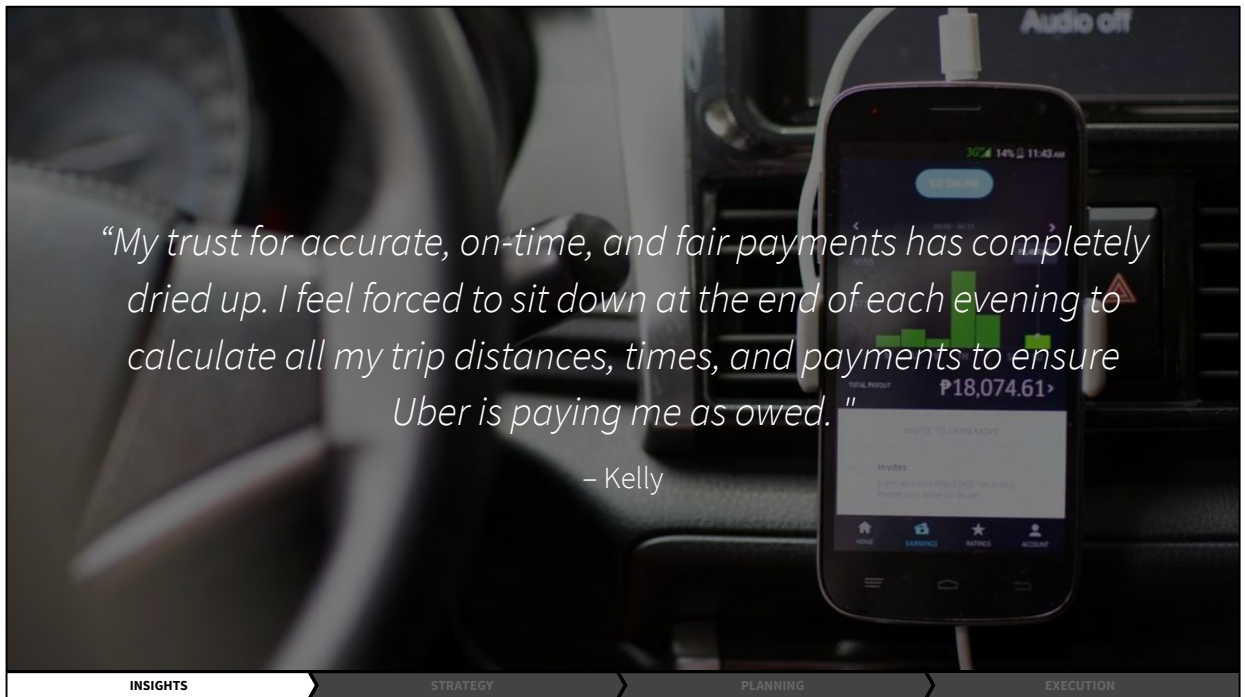
– Kelly

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Earnings

Drivers drive to maximize their earnings per effort, and this isn't always in sync with our offers and pricing.

When our offers don't align with driver motivations, drivers churn (e.g. new drivers with below average EPH), or undermine the rider experience (e.g. cherry picking results in ETA increases).

Where demand is

Where drivers are

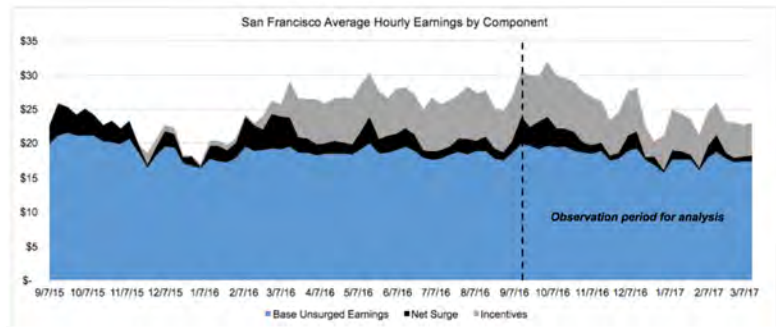*Where drivers' Destinations are set to*
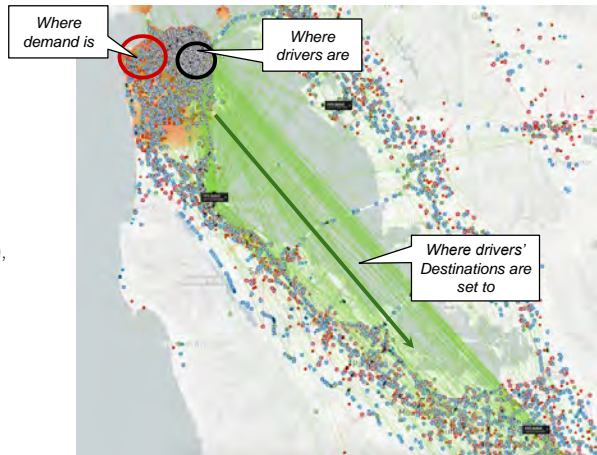
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Earnings

Drivers value steady, predictable earnings — but today, luck plays too big a factor.

San Francisco Average Hourly Earnings by Component

Observation period for analysis

Base Unsurged Earnings   Net Surge   Incentives

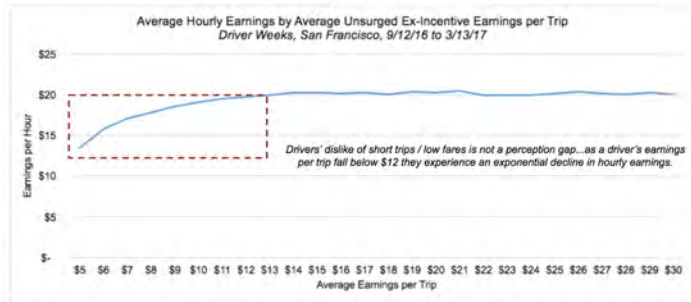INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

Drivers should be indifferent to trip choice, but they're not.

Pool, for example, is sometimes a poor earnings choice.

Average Hourly Earnings by Average Unsurged Ex-Incentive Earnings per Trip
Driver Weeks, San Francisco, 9/12/16 to 3/13/17

Drivers' dislike of short trips / low fares is not a perception gap...as a driver's earnings per trip fall below $12 they experience an exponential decline in hourly earnings.
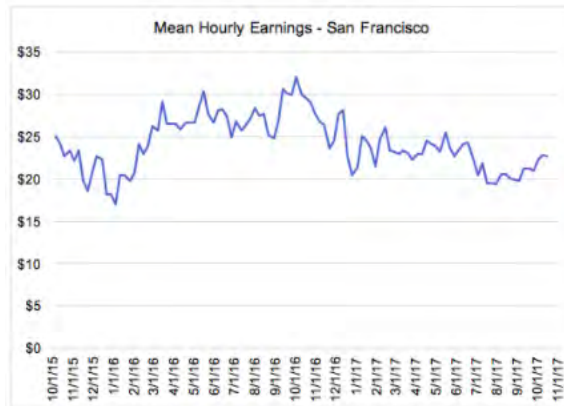
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

The US marketplace adjusts quickly to rate changes and incentives, so hourly earnings tend to flatten over the long term. We need to set more realistic expectations.

Mean Hourly Earnings - San Francisco

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Drivers' long-term hourly earnings stay close to the local minimum wage (after expenses), even when we deploy driver rate changes and new incentives. We need to set more realistic expectations.
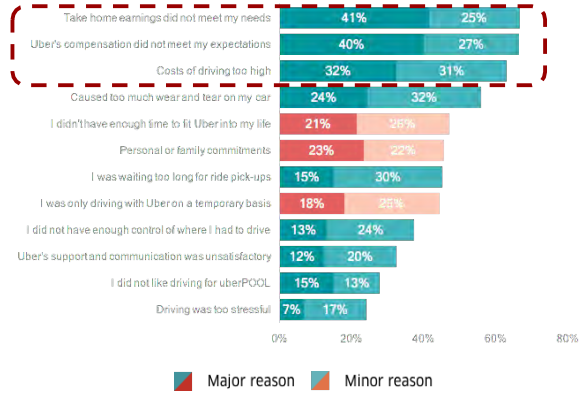
Driver Earnings

New drivers often join the platform with unrealistic earnings expectations or ones that are formed quickly within the first few trips, resulting in dissatisfaction and churn.

There is very little difference between the full and part-time incentives experience - making it challenging for drivers to know how to set their earnings expectations.

Top reasons for churn are related to Uber
Economic factors related to earnings are the main drivers

Which of the following reasons would you say contributed to your decision not to drive with Uber?

Reason	Major reason	Minor reason
Take home earnings did not meet my needs	41%	25%
Uber's compensation did not meet my expectations	40%	27%
Costs of driving too high	32%	31%
Caused too much wear and tear on my car	24%	32%
I didn't have enough time to fit Uber into my life	21%	26%
Personal or family commitments	23%	22%
I was waiting too long for ride pick-ups	15%	30%
I was only driving with Uber on a temporary basis	18%	26%
I did not have enough control of where I had to drive	13%	24%
Uber's support and communication was unsatisfactory	12%	20%
I did not like driving for uberPOOL	15%	13%
Driving was too stressful	7%	17%

■ Major reason   ■ Minor reason

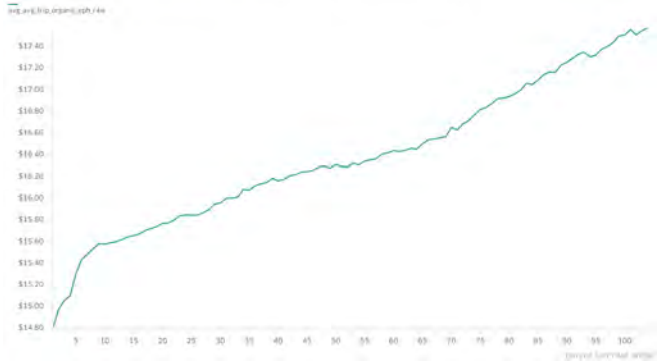INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

Driver earnings vary based on skill and tenure—and new drivers are significantly less productive than veteran drivers.

Yet earnings expectations are often based on early trips, which results in disappointment and churn.

Driver earnings increase with tenure.
Data: LA/SF/CHI/DC/BOS drivers in 2017 who've achieved >= 26 weeks of tenure (trip earnings only)

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Earnings

Around 10% of new drivers earn less than $7/hr in their first day, and these drivers are 15% less likely to drive a second day.

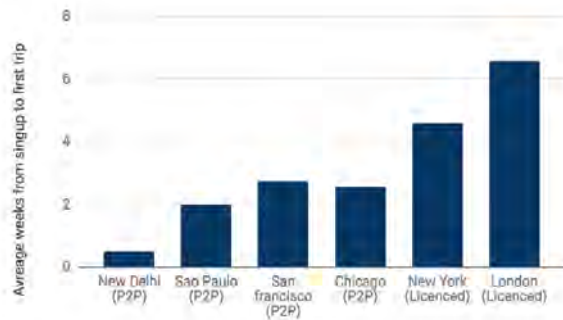INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

Getting started with Uber can be slower than competing blue-collar jobs—while offering less transparency and onboarding support.

And delays are longer in cities that require licences.

Median weeks from sign-up to first trip
licenced vs unlicenced cities

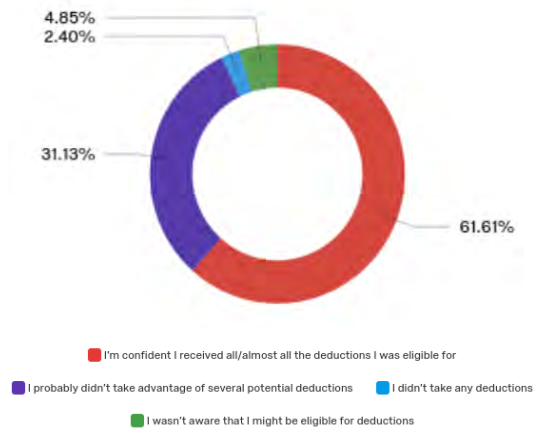INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

Costs are high and make a big difference in earnings, taxes above all.

And many drivers are unaware of or unclear on deductions they can claim.

Which best describes how you feel about your income tax deductions? (US)

4.85%
2.40%
31.13%
61.61%

■ I'm confident I received all/almost all the deductions I was eligible for

■ I probably didn't take advantage of several potential deductions   ■ I didn't take any deductions

■ I wasn't aware that I might be eligible for deductions
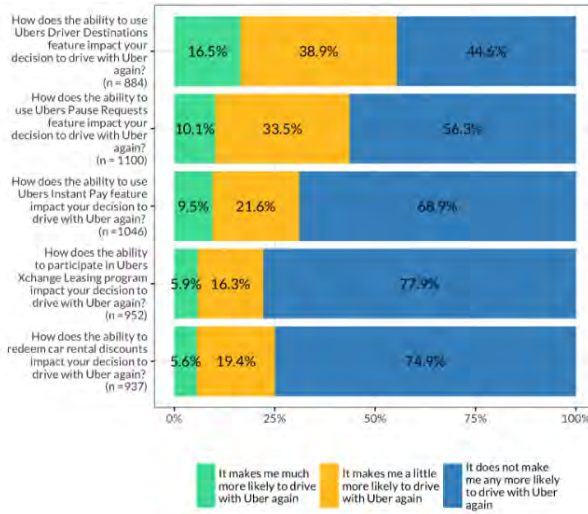
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Earnings

Drivers love flexibility that allows Uber to fit more effectively into their lives—which allows them to earn with more of their available hours.
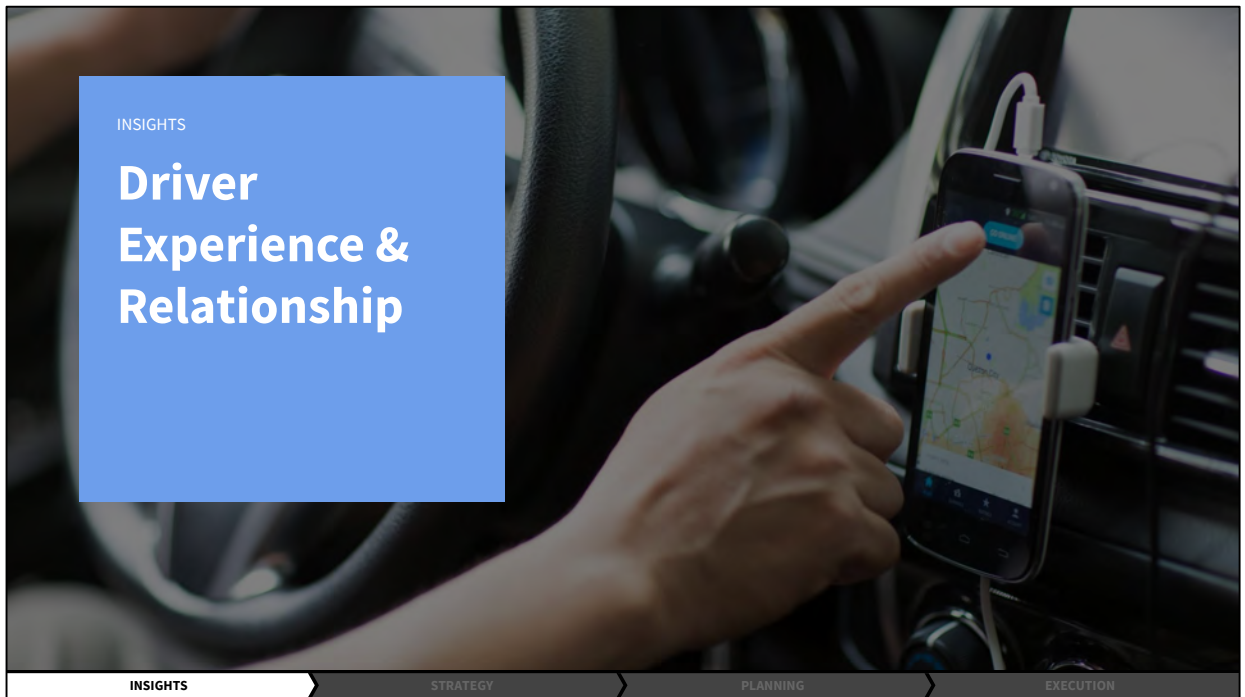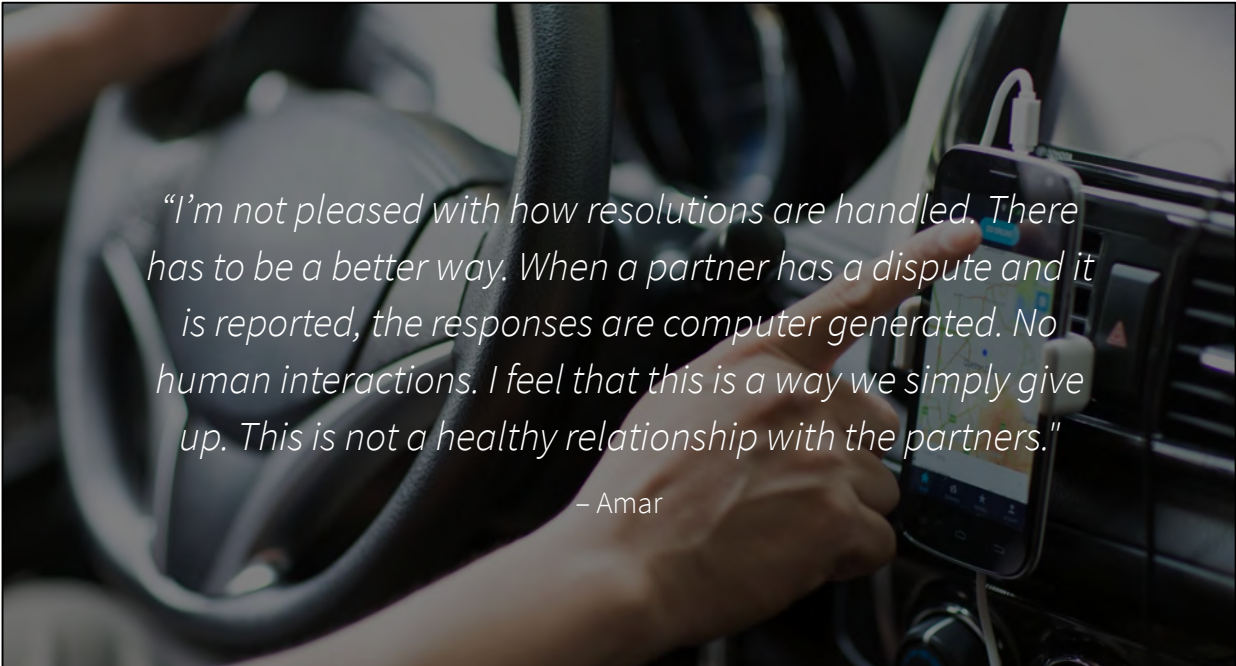

Question	It makes me much more likely to drive with Uber again	It makes me a little more likely to drive with Uber again	It does not make me any more likely to drive with Uber again
How does the ability to use Ubers Driver Destinations feature impact your decision to drive with Uber again? (n = 884)	16.5%	38.9%	44.5%
How does the ability to use Ubers Pause Requests feature impact your decision to drive with Uber again? (n = 1100)	10.1%	33.5%	56.3%
How does the ability to use Ubers Instant Pay feature impact your decision to drive with Uber again? (n = 1046)	9.5%	21.6%	68.9%
How does the ability to participate in Ubers Xchange Leasing program impact your decision to drive with Uber again? (n = 952)	5.9%	16.3%	77.9%
How does the ability to redeem car rental discounts impact your decision to drive with Uber again? (n = 937)	5.6%	19.4%	74.9%

INSIGHTS   STRATEGY   PLANNING   EXECUTION

INSIGHTS

Driver Experience & Relationship

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

"I'm not pleased with how resolutions are handled. There has to be a better way. When a partner has a dispute and it is reported, the responses are computer generated. No human interactions. I feel that this is a way we simply give up. This is not a healthy relationship with the partners."
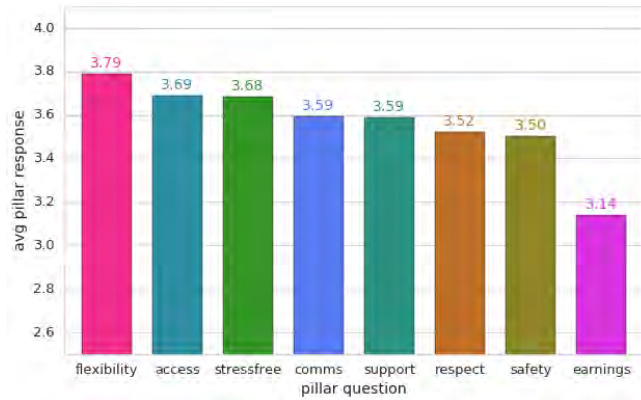
– Amar

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Experience & Relationship

We have significant room for improvement across each one of the 8 Driver Needs.

Driver Experience & Relationship

The fundamental experience of driving can be stressful.
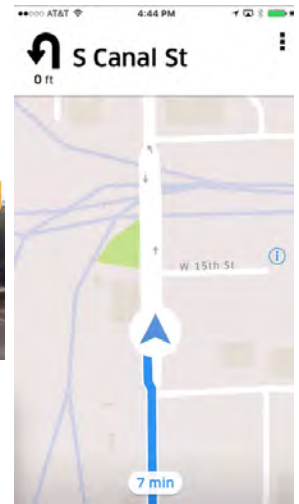
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience & Relationship

Drivers at every lifecycle stage still frequently experience glitches, along with time-consuming or costly flaws in basic aspects of the experience.

This is apparent across all 8 Driver Needs and undermines retention.

p90 ATA - ETA Delta by Mega Region
(Restricted to trips with 4-8 min ETA)
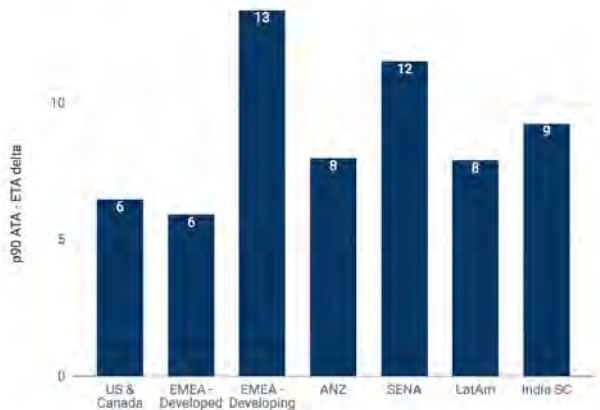
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Experience & Relationship

Drivers do not feel Uber's commitment to partnership. They see us as transactional, untrustworthy, and acting in our own self-interest.

When needed, we are hard to reach and seen as tone deaf. Loyalty from drivers is not rewarded by loyalty from Uber. **Ultimately, we make drivers feel like numbers, not people**. This undermines retention.

Drop in average pillar sentiments over the first year

flexibility, 8.2%
access, 8.4%
rating, 18.2%
stressfree, 16.8%
comms, 15.8%
respect, 19.3%
safety, 17.8%
earnings, 19.0%

rating
access
comms
earnings
flexibility
respect
safety
stressfree
support

Avg response — Weeks since first trip
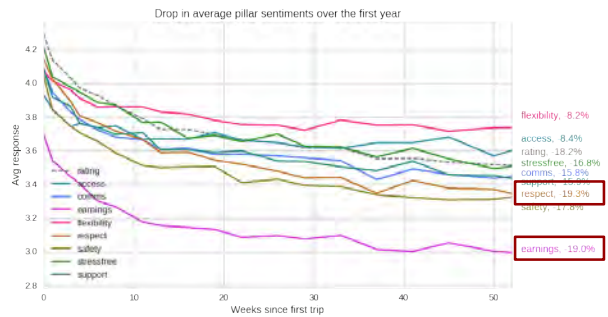
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience & Relationship

Although cash payments enable a larger percentage of trips for drivers in emerging markets, these trips have led to increasingly larger defect rates, stress, and safety concerns.

Percentage of Cash Trips by Mega-Region
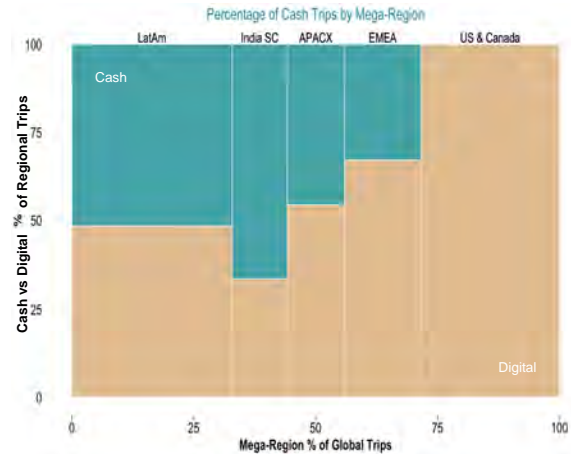
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience & Relationship

Drivers too often experience safety incidents or feel unsafe.

We fall behind competitors in how drivers view our commitment to safety. **Few agree that Uber is doing enough to keep them safe.**

% of Drivers who Say They Are
Concerned About Crime/Violence in Their City
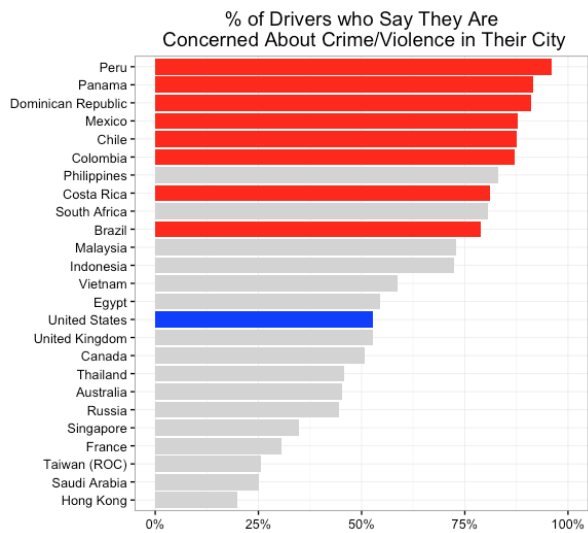
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Driver Experience & Relationship

We aren't yet addressing top barriers (e.g., safety, access) to make driving more attractive to more people.

Large segments of prospective drivers are holding back because of identified barriers.

Q 2.2 What should **new women Drivers** know before driving with Uber?
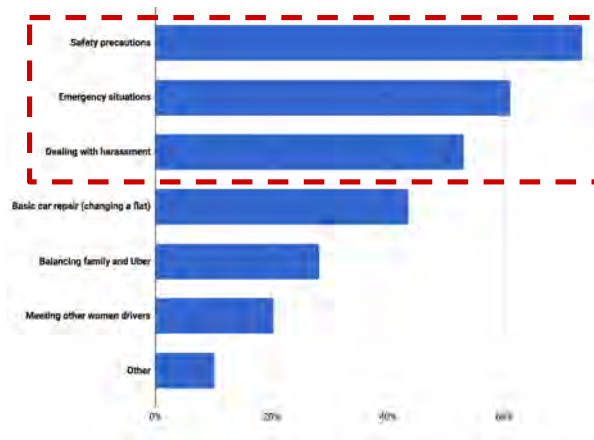
Driver Experience & Relationship

Outside of the US, we lack tailored support for widespread experiences, like cash payments and fleet support.

Fleets make up a large percent of our driver force, but have a limited set of effective tools and support. The cash experience is similarly suboptimal.

Rank	contact_type	Contribution %	Cumulative %
1	Driver > Trips > Fare review > upfront pricing (not uberPOOL)	17%	17%
2	Driver > Trips > Feedback about rider > Attitude	5%	22%
3	Driver > Trips > Fare review > Fare seems low	4%	27%
4	Driver > Trips > Fare review > Cancellation Fee > Cancellation policy	4%	31%
5	Driver > Trips > Fare review > Cash payment market > Rider error > Rider didn't have enough cash	4%	35%
6	Driver > Trips > Fare review > Tolls, surcharges & fees > Toll didn't apply	4%	38%
7	Driver > Trips > Fare review > Mistimed trip > Tech error	4%	42%
8	Driver > Trips > Fare review > Cash payment market > Technical issue	3%	45%
9	Driver > Trips > Fare review > Cash payment market > Rider error > Rider refused to pay cash	3%	49%
10	Driver > Trips > Fare review > Cancellation Fee	3%	52%

Top issue types

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience & Relationship

Drivers find today's shared rides experience stressful and not worth the earnings.

Yet our best current bet to unlock the next tier of growth is become a **Shared Rides First business.**

% of drivers satisfied with Uber for each attribute

| Attribute	Total	Looking	Content	Loyal
Cancellation Freq	56%	49%	61%	56%
Training	55%	40%	64%	68%
Navigation	55%	45%	60%	69%
Recognition	50%	32%	59%	71%
Tips	47%	29%	56%	68%
Drivers	46%	35%	52%	64%
Earnings/Trip	46%	23%	59%	73%
Commission/Uber	46%	27%	56%	70%
Promotion Ease	46%	31%	53%	66%
Promotion Fit	45%	29%	54%	68%
Promotion Earnings	43%	29%	51%	62%
Promotion Consistency	43%	30%	50%	63%
Promotion Fairness	40%	27%	47%	58%
Pool Earnings	23%	13%	27%	39%

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Driver Experience & Relationship

Rider behavior is a major pain point for drivers.

Net Advantage of Uber vs. Lyft by Attribute
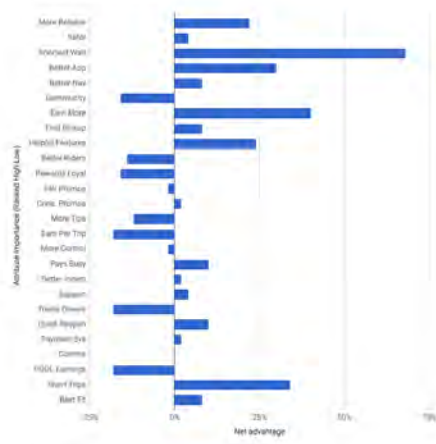
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience & Relationship

The Driver side of our business represents significant compliance and regulatory risk.

Complex onboarding, and re-entry is increasingly a barrier.

Country Rank	Country Name	Onboarding Breakdown
1	United States	35% Standard Docs 60% Fetch Docs 5% Heavily Licensed
2	Brazil	100% Fetch Docs
3	United Kingdom	100% Heavily Licensed
4	Mexico	100% Fleet
5	Australia	100% Heavily Licensed
6	India	100% Fetch Docs
7	France	100% Heavily Licensed
8	Canada	100% Fetch Docs
9	Indonesia	100% Fleet
10	Saudi Arabia	100% Standard Docs
11	Singapore	100% Heavily Licensed

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Driver Experience & Relationship

Driver loyalty is not recognized or rewarded today, and there is limited opportunity for progression.

Segment	Week 4 Retention	% Drivers	% Trips	% Supply Hours	Avg NPS Rating	NPS
Rookie Occasional	48%	24%	8%	10%	8.01	37.68
Rookie Part Timer	67%	8%	6%	7%	8.47	50.53
Rookie Full Timer	75%	8%	13%	13%	8.53	52.11
Veteran Occasional	67%	16%	7%	9%	6.85 (-1.16)	10.40 (-27.28)
Veteran Part-Timer	81%	12%	10%	11%	7.34 (-1.13)	21.95 (-28.58)
Veteran Full-Timer	88%	32%	56%	50%	7.78 (-.75)	33.90 (-18.21)

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Driver Experience and Relationship

Very little about our platform currently motivates and rewards good service or quality from drivers.

Drivers can't build repeat business with the riders they serve. Tipping for service is not yet widespread. Great star ratings don't earn drivers additional recognition or earnings.

	% Trips Tipped	Tip/Trip	Avg. Tip	Earnings
Uber	13.5%	$0.43	**$3.15**	4.1%
Lyft	**30%**	**$0.65**	$2.16	**7.2%**

	Always Tip	Regular Tip	Never Tip
Uber Riders	1%	3.7%	69%
Lyft Riders	**6.1%**	**16.2**	**26%**

INSIGHTS   STRATEGY   PLANNING   EXECUTION

INSIGHTS

Rider Experience

INSIGHTS | STRATEGY | PLANNING | EXECUTION

"In the past 2.5 years, I have seen the driver quality totally deteriorate. I believe there should be an actual driving test for some of these drivers as they don't seem to have any common sense. In some cases, it's embarrassing for me to be associated with Uber."

– Brian

INSIGHTS   STRATEGY   PLANNING   EXECUTION
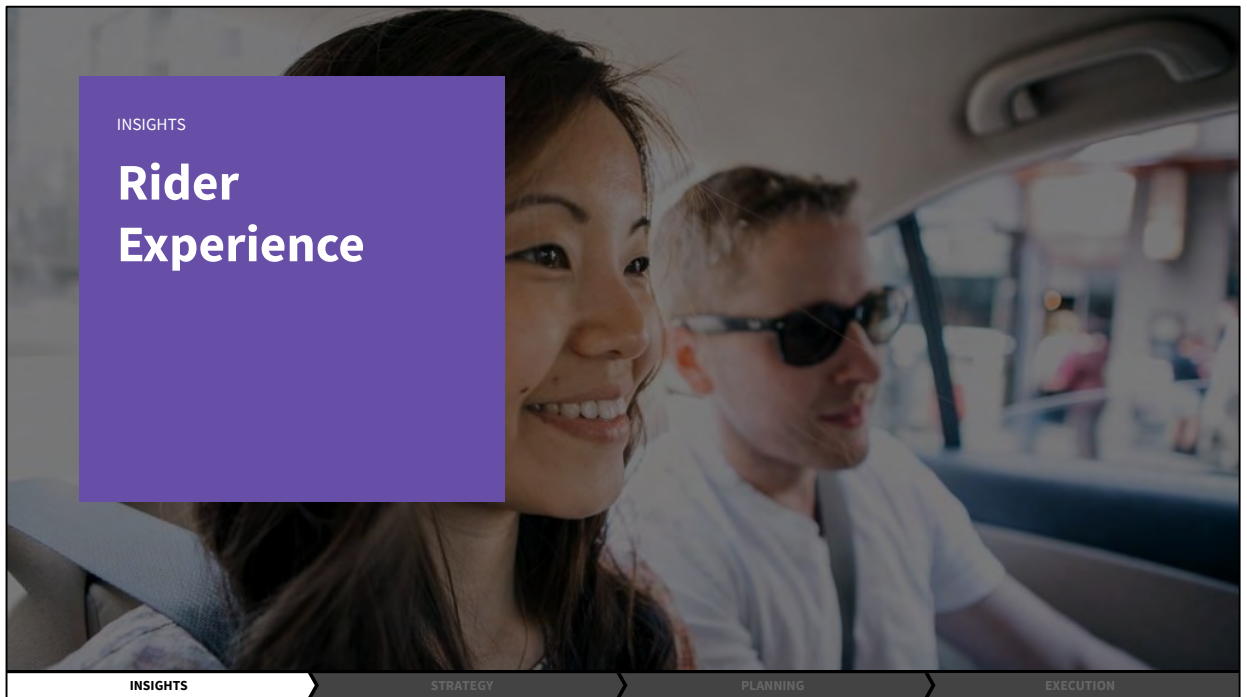
Rider Experience

Our riders are too often dissatisfied with the quality of our drivers and the overall in-car experience (car quality, cleanliness).
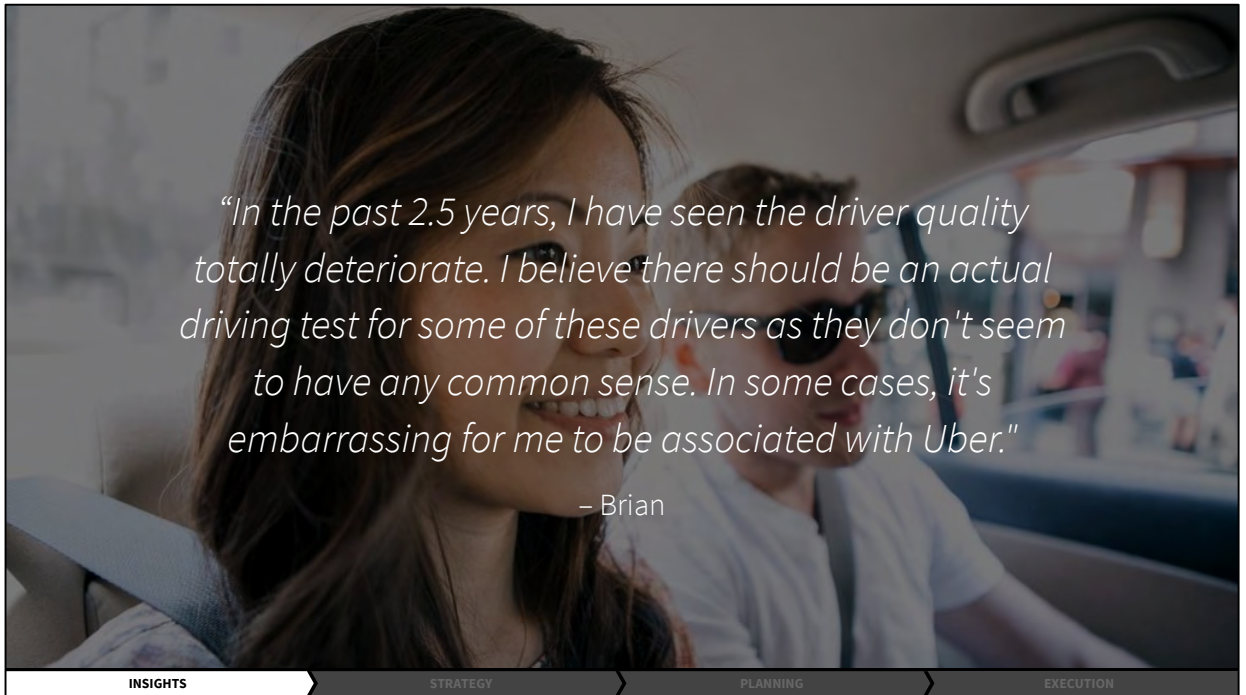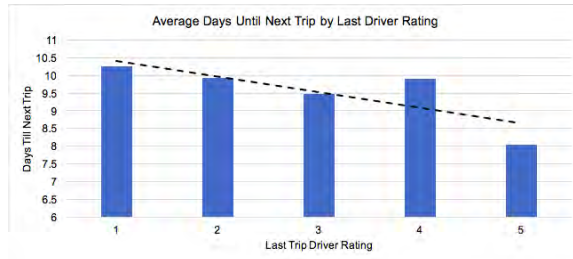
This affects their ridership and our likelihood to be their first choice.

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Rider Experience

How we treat drivers impacts rider experience, and is a critical driver of rider favorability.

Riders hear directly from drivers on how we treat them and the current driver consensus is still poor.

Uber vs. Lyft Attribute Advantages among Dual Appers
Correlation of Attributes to Uber Favorability (Topbox)

How good are we at it?

- Uber +50%
- Uber +25%
- Uber vs. Lyft Net Attribute Advantage
- Lyft +25%
- Lyft +50%

Surge Prices More Often
Higher Surge Prices
More Friends Use
Shortest Wait
Better App
Easier to Find Car — More Reliable
Preference
More Accurate Wait Times
Better Communication
More Professional Drivers
Feel Safer — Better Customer Support
Trust
Lower Prices on Average — Better Drivers
Better Deals/Promotions
Friendlier Drivers
Drivers' Preference
Treats Drivers Better
Better Morals or More Integrity
Better Tipping Experience

-0.1   0.0   0.1   0.2   0.3

How important is it?

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Rider Experience

We are not excelling on rider safety—both in real terms and in terms of rider perception. And riders care.

% of dual-appers who say 'makes me feel a lot safer'
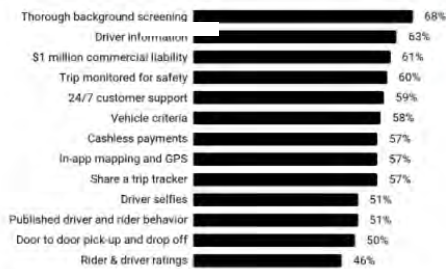
	%	Awareness UBER	Awareness lyft
Thorough background screening	68%	45%	44%
Driver information	63%	88%	79%
$1 million commercial liability	61%	16%	17%
Trip monitored for safety	60%	37%	31%
24/7 customer support	59%	42%	35%
Vehicle criteria	58%	46%	41%
Cashless payments	57%	73%	66%
In-app mapping and GPS	57%	89%	80%
Share a trip tracker	57%	56%	39%
Driver selfies	51%	44%	39%
Published driver and rider behavior	51%	36%	32%
Door to door pick-up and drop off	50%	89%	83%
Rider & driver ratings	46%	89%	76%

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

In the US, fewer riders than you would expect are aware of key safety features on the platform, notably insurance and background checks.

Safety concerns among riders -- and drivers as we saw earlier -- outside the US can be more severe than this.

INSIGHTS

Spend Efficiency

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |
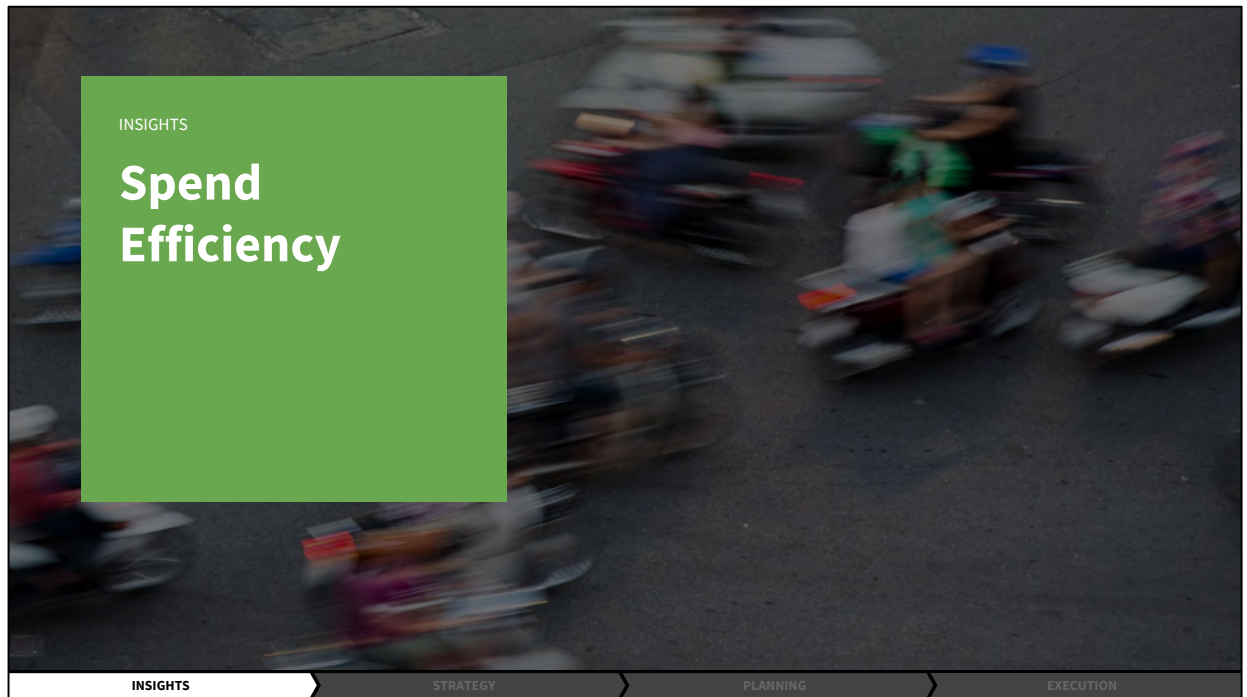
Spend Efficiency

Outside of marketplace balance, we have many cost inefficiencies. (e.g. support costs, insurance costs). Insurance costs per trip are currently higher than driver incentives per trip in the US. Incremental improvements here will grow our overall bottom line, which we can reinvest in our users.

$/trip	2015	2016	2017 YTD
Current cost estimate	$1.09	$1.34	$1.54
Original cost estimate*	$0.73	$0.87	$1.43
% of NR As Reported	19%	30%	46%
% of NR with True-Ups	28%	46%	49%

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Spend Efficiency

There is inefficiency with how we incentivize signups per channel.

We spend a considerable amount to acquire new drivers during demand constrained times and on demand during driver constrained times.
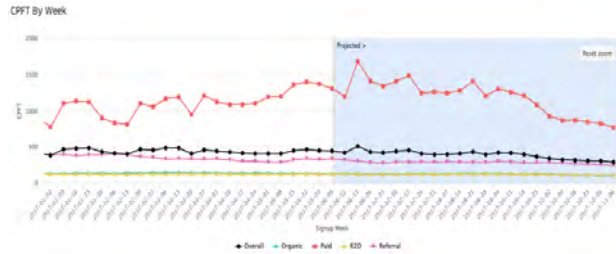
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Spend Efficiency

Organic signups are the most cost-effective channel for new users. However, they require innovation to see additional return.

Acquisition Profit Component: Value per New Driver (LTV - CPFT)
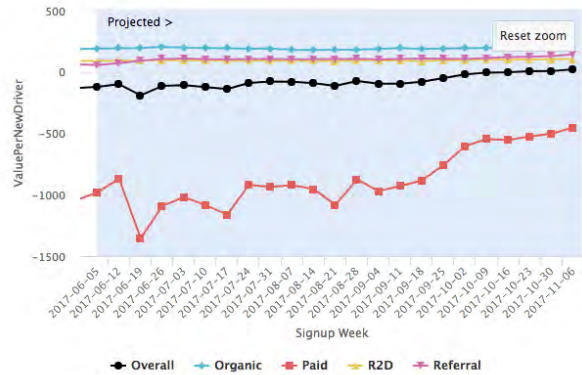
Note: Acquisition Profit is defined as (Num. FTs) * (LTV - CPFT) for each cohort

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

INSIGHTS

Results

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |
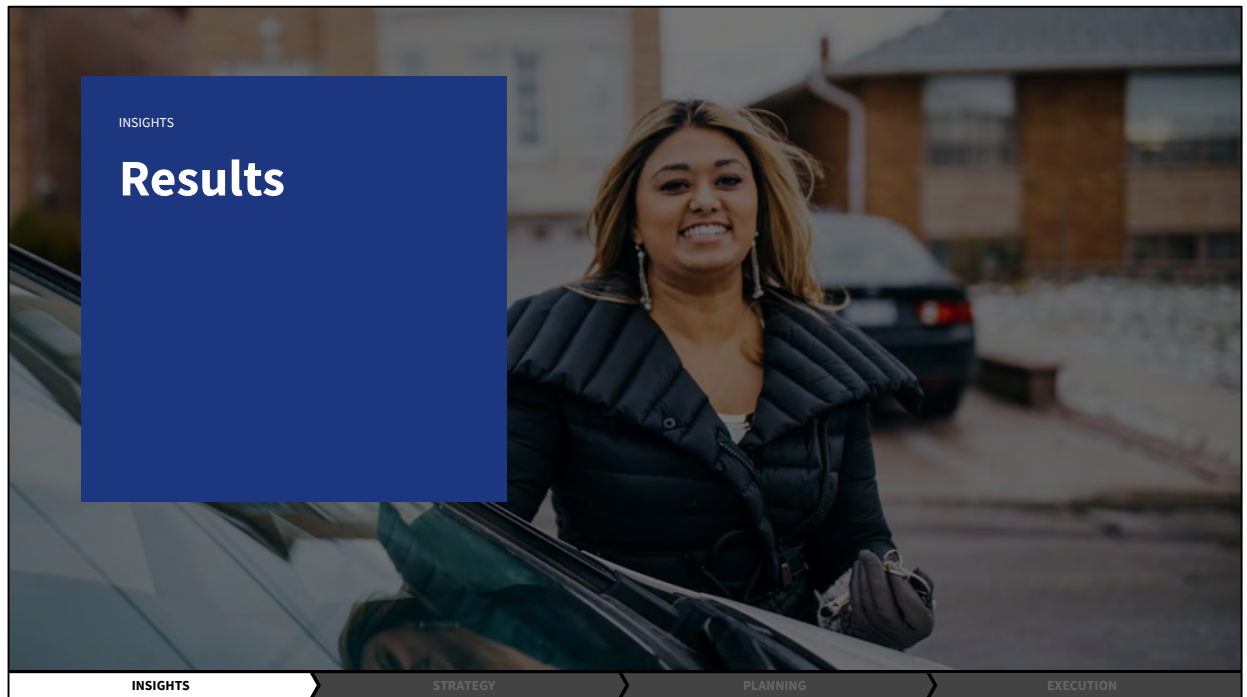
Results

On a good note, we continue to grow at a fairly dramatic pace.

Monthly Active Drivers Globally
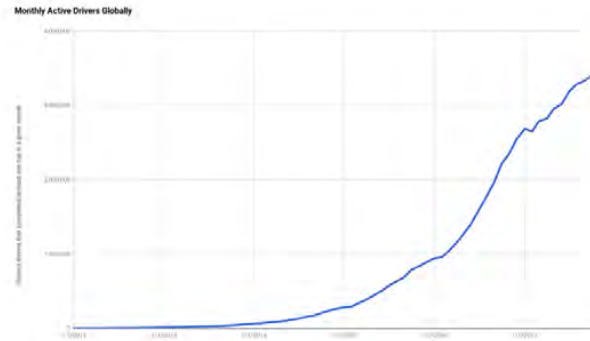
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

H2 2017 drove marked improvements in Driver Sentiment.

Change in Mean Driver Sentiment Since June

Legend: APACX EMEA India SC LatAm US & Canada Global
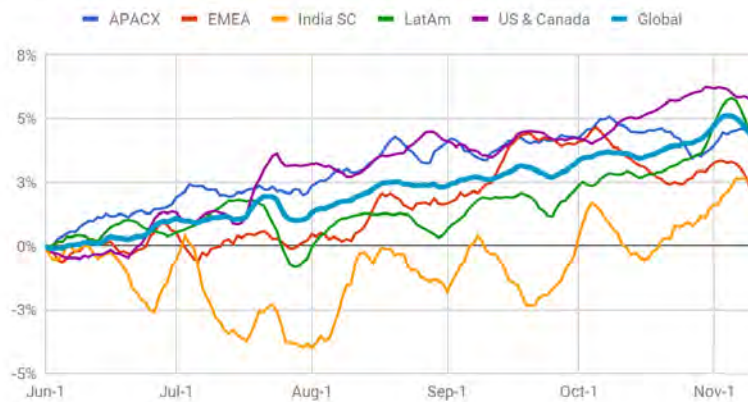
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

Four week retention for new drivers increased by 2% in H2.
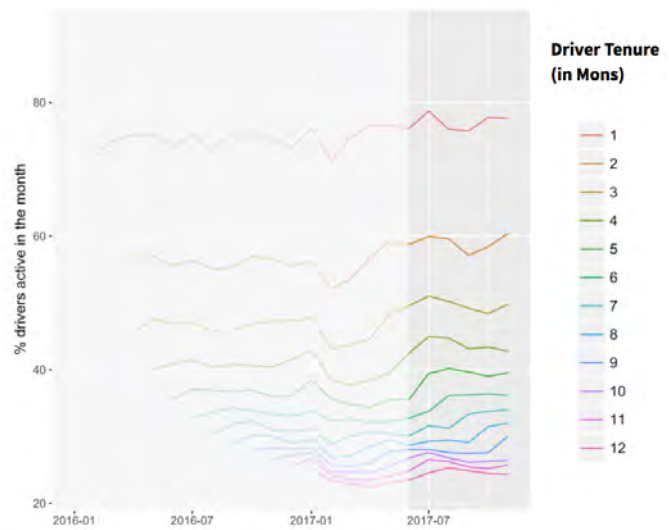
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

CSAT increased from 3.8 in August to 4.1 in November with Drivers now receiving 35% of support through phone.

Driver Support CSAT
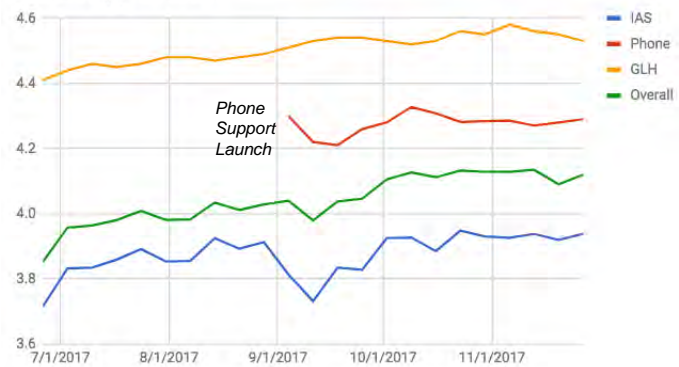
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

And introduced new opportunities to earn on the platform.

	$ Per Eligible Trip	Total Payout to Drivers to-date	Annual Run Rate
Tips	$0.43	$194 M	$540 M
Pay For Wait Time	$0.32	$30.2 M	$200 M
POOL Pickup Fare	$0.80 (per chain)	$12.5 M	$65 M
Long Cancel Fee	/	$1 M	/
Pay4ETA	/	$1.8 M (in 20 launch cities)	/

INSIGHTS	STRATEGY	PLANNING	EXECUTION

However...

Results

New driver growth is slowing.

Weekly DFTs by mega region (excl Russia)
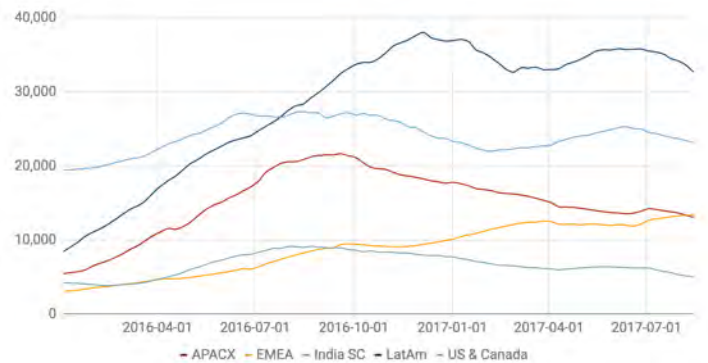
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

Driver retention remains expensive. Churn is troubling.

US Driver Retention by Weeks Since First Trip
Darker Lines are Newer Cohorts

Only 50% of drivers are still on the road after 8 weeks...

...and only 25% are left by week 39
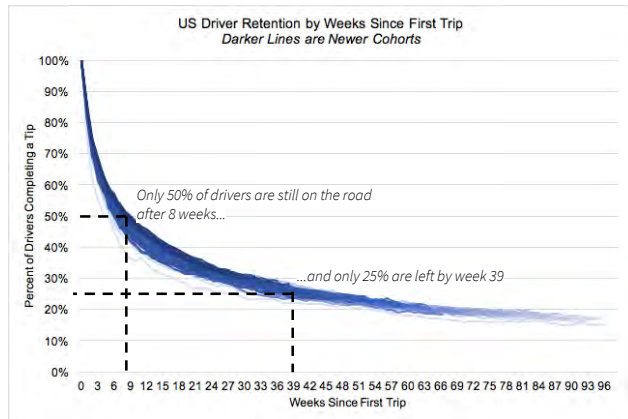
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

Sentiment still has a long way to go— particularly related to earnings.
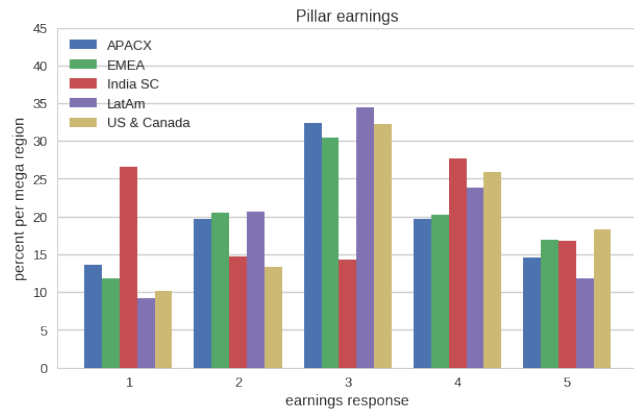
INSIGHTS   STRATEGY   PLANNING   EXECUTION

Results

Dual-apping* among US drivers is increasing, and undermining our primary competitive advantage of relative scale.

* Dual-apping is the smart economic choice for drivers

US Active Driver - % Drivers Dual Apping with Lyft in Month
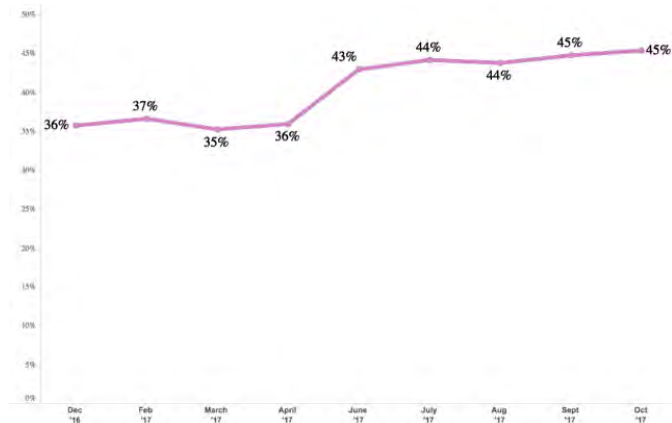
| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Results

And riders are also increasingly dissatisfied and dual-apping.

That results in decreasing CP—at enormous cost.

Category Rider Distribution by Platform

Uber Exclusive   DA - Uber   Shared Share   DA - Lyft   Lyft Exclusive
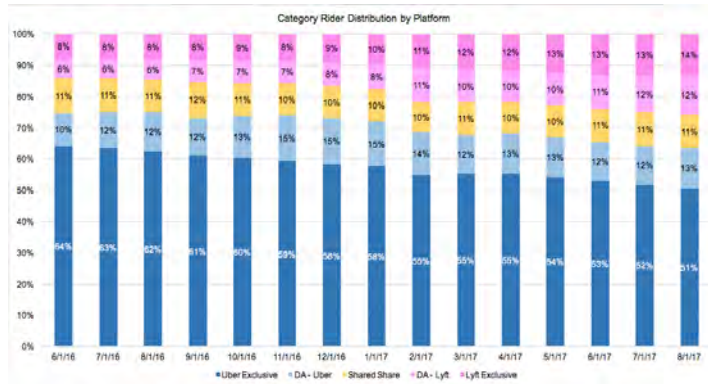
| Riders who have only ever ridden with Lyft |
| Riders who have previously used Uber, but only rode on Lyft in a given timeframe |
| Riders who took a trip on both platforms in a given timeframe |
| Riders who have previously used Lyft, but only rode on Uber in a given timeframe |
| Riders who have only ever ridden with Uber |

INSIGHTS   STRATEGY   PLANNING   EXECUTION

So...we have
work to do
in 2018.

2018 Strategy

Billy
- Alright so, with that, we'll walk through our 2018 Driver Strategy
- I walked through this yesterday at the highest level on the staff call, but today we're going to get into it in a bit more depth.
- Remember, this is not a tech strategy, or an Ops strategy, this is Uber's 2018 Driver strategy

We are stewards of an ecosystem that grows the world's best-loved way to move people and things —affordable, reliable, and safe.

That ecosystem is extraordinarily powerful —and fragile. It runs on math and trust.

At its heart is the partnership between drivers and Uber. We're on the same side.

INSIGHTS   STRATEGY   PLANNING   EXECUTION
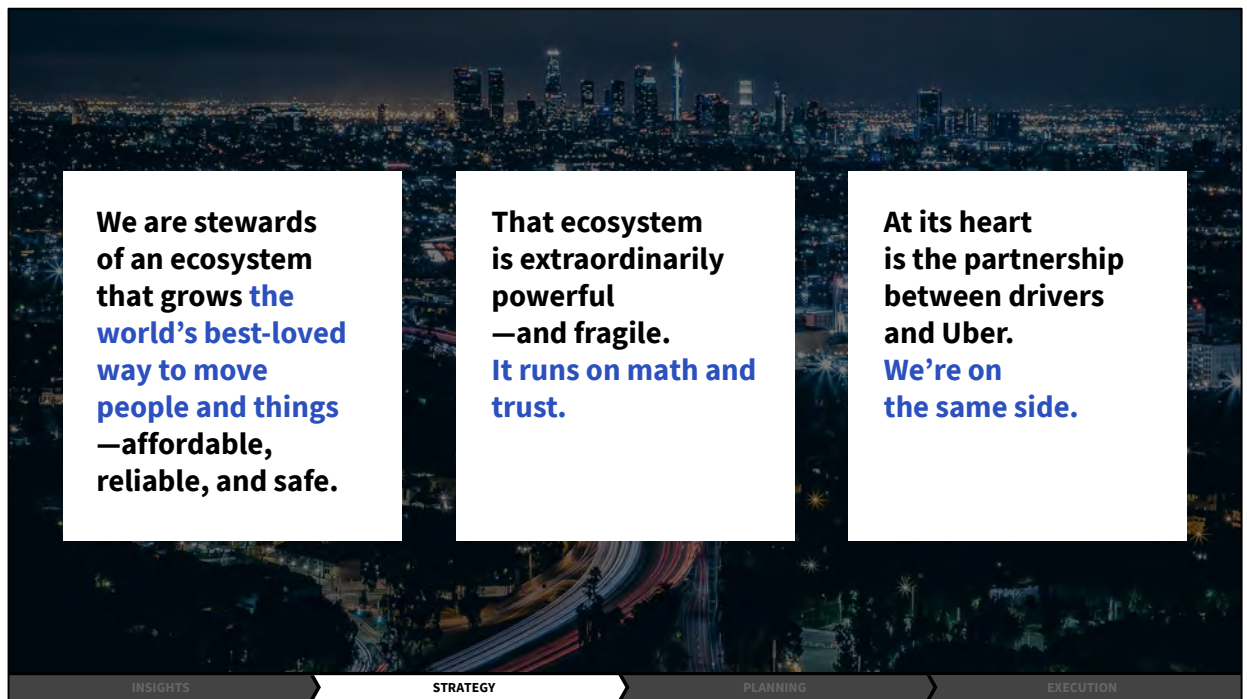
Billy
- A few guiding truths we have come to realize over the past half that we need to keep in mind as we build the strategy

- 1 (read box 1)
  - This means we need to be incredibly thoughtful about how our decisions affect the balance of that ecosystem.
  - Small changes can have big, disparate impacts on participants in the marketplace
- 2 (read box 2)
  - This means trust is ultimately what gives us the space to roll out changes to features that drivers don't completely understand
  - We've re-built trust since the beginning of 180, but we're still not where we need to be and small missteps are a big deal
  - We need to get to a point where small missteps are not a big deal
- 3 (read box 3)
  - While there are near-term things we can do (and have done) to shift the balance in our favor, the reality is, without happy drivers we do not have a sustainable platform

When the partnership between Uber & Drivers is healthy...

Uber unlocks Opportunity
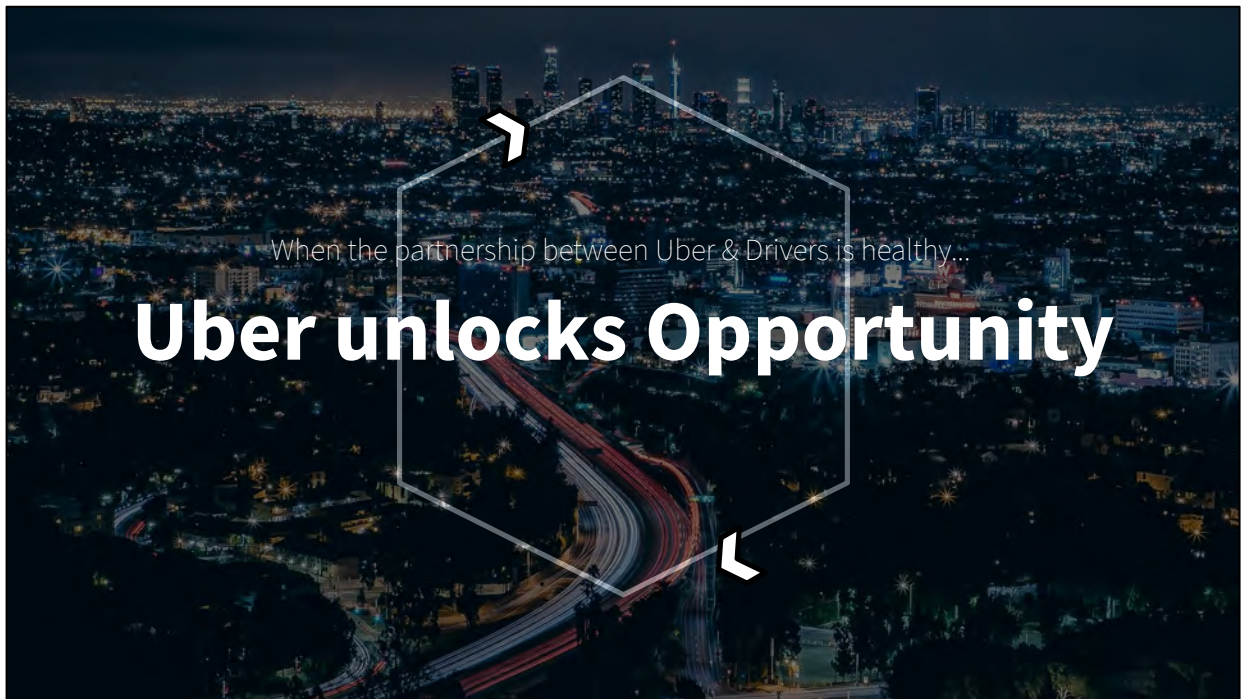
Billy
- Our strategy starts with a simple premise: Uber, much like any marketplace, works best when it works for everyone
- That means drivers, riders, and Uber's interests are all aligned, and everyone can participate on the platform sustainably

The Flywheel of
Opportunity

Uber takes care of drivers...

We help new drivers succeed quickly, and work to keep existing drivers safe, rewarded, and satisfied.

...so that drivers can be there for our riders

When we match high-quality drivers with riders more effectively than anyone else, across all kinds of trips, deliveries, and transport options...

Uber becomes first choice in every market

As that scale brings more riders more often...

...both loyal and new drivers find more opportunities.

The work ahead

In 2018, our strategy is to enhance and grow this flywheel, to offer enduring opportunity to millions of drivers.

This is a tremendous and inspiring challenge.

Billy
So we're going to invest in this flywheel in 2018, and prioritize efforts that occupy a place on this flywheel
This means we'll make some different changes for 2017

Our 2018
**Driver
Strategy…**
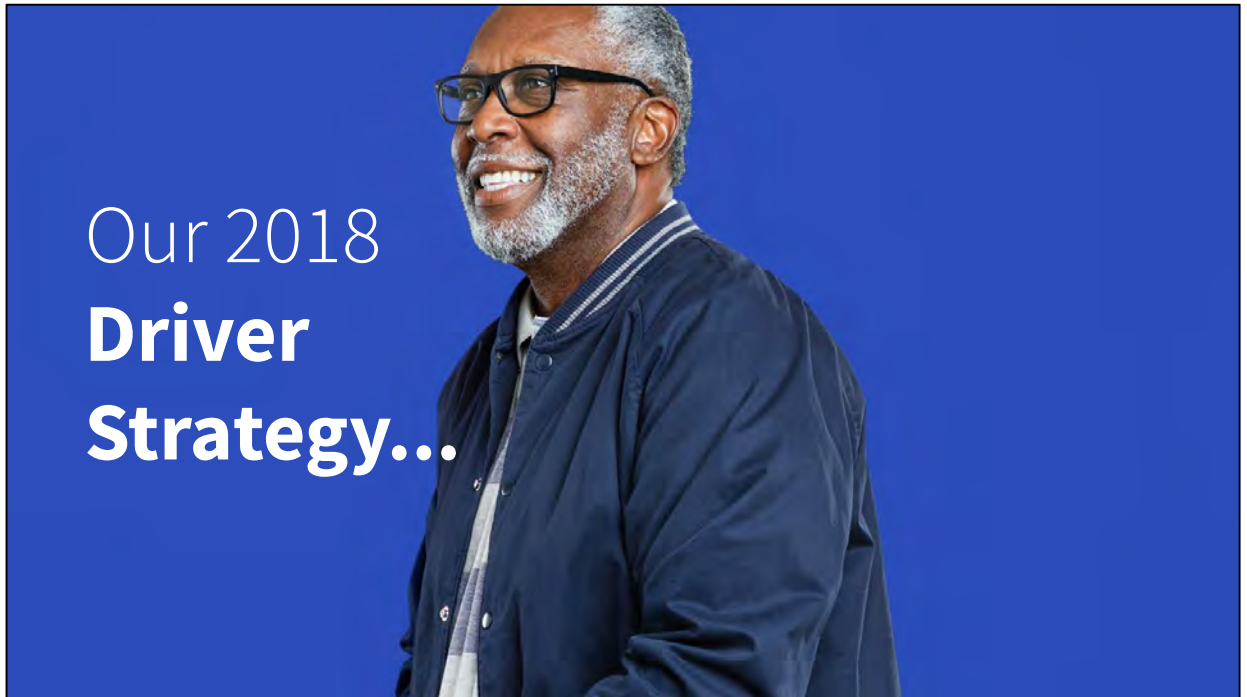
Our 2018 is TRUE PARTNERSHIP

-- We've called drivers our partners for a long time, but have we truly delivered on what that means? This year we will focus on making the promise of partnership real.

Britt

- **So what is true partnership? We're introducing the strategy with a manifesto that will helps us to define what that means.**
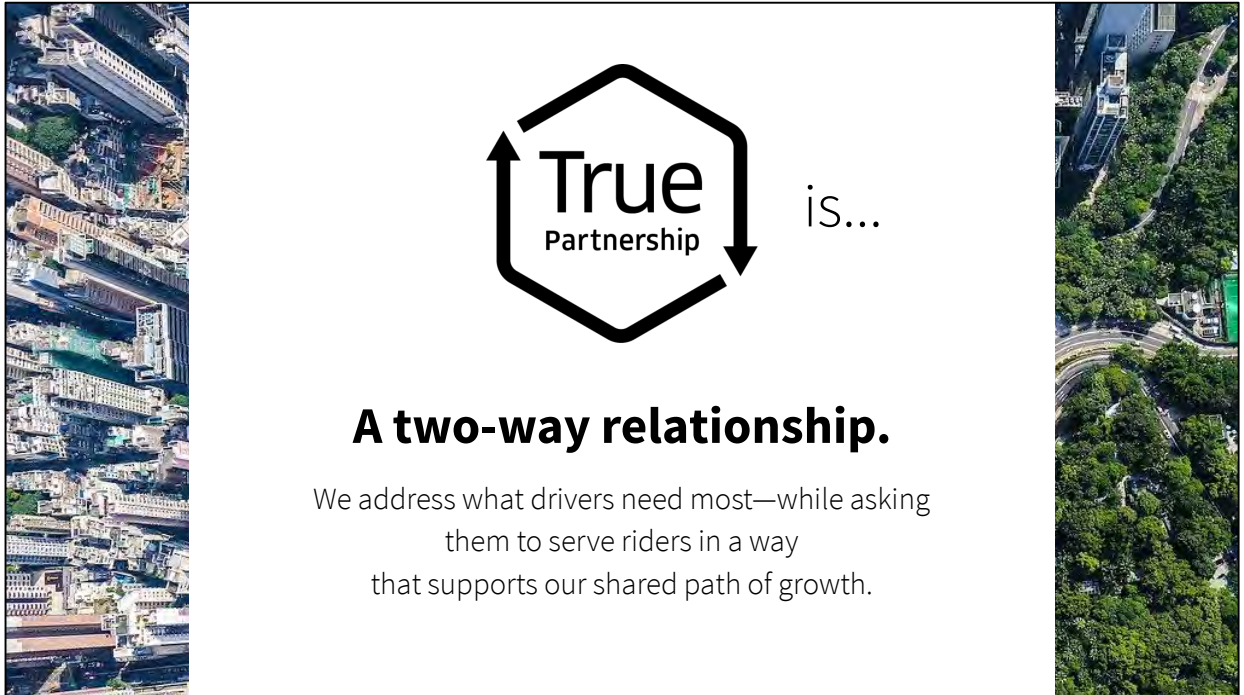
Britt:
- **A two-way relationship.**
- We address what drivers need most—while asking them to serve riders in a way that supports our shared path of growth.

True Partnership is...

Setting realistic expectations for drivers—
then working tirelessly to exceed them.

·

Making Uber really work for drivers' varying lives, and
**attracting and keeping the people who want
to drive the hours and places needed.**

·

Treating drivers with immense respect and consideration as
business partners whose success drives ours.

Britt:

- **Setting realistic expectations for drivers**— then working tirelessly to exceed them.
- Making Uber really work for drivers' varying lives, and **attracting and keeping the people who want to drive the hours and places needed.**
- Treating drivers with immense respect and consideration as **business partners whose success drives ours.**

True Partnership is...

Putting driver safety first.
Even when it means short-term sacrifice.

.

Seeing Uber as a service, first and foremost.
We look after drivers so they can take care of riders.

.

**Dismantling the myth of the
all-powerful, mega-profitable Uber
playing overlord with their livelihoods**
—and offering transparency, clarity,
and humility in its place.

Britt:

- **Putting driver safety first.** Even when it means short-term sacrifice.
- **Seeing Uber as a service, first and foremost.** We look after drivers so they can take care of riders.
- **Dismantling the myth of the all-powerful, mega-profitable Uber playing overlord with their livelihoods**
  —and offering transparency, clarity, and humility in its place.

True Partnership is...

Recognizing quality and loyalty.
We stick with drivers for the long haul, and ask them to do the
same. And we make sure that safe, high-quality, consistent
drivers see rewards, rather than subsidizing others.

.

Asking for drivers' help
in making our ecosystem work—
from shared rides to safety to perfect pickups.

.

**Trusting that a healthy Uber
ecosystem can offer paths to opportunity**
that match and surpass what great drivers expect.

Britt:

- **Recognizing quality and loyalty.**
  We stick with drivers for the long haul, and ask them to do the same. And we
  make sure that safe, high-quality, consistent drivers see rewards, rather than
  subsidizing others.
- **Asking for drivers' help** in making our ecosystem work—from shared rides to
  safety to perfect pickups.
- **Trusting that a healthy Uber ecosystem can offer paths to opportunity**
  that match and surpass what great drivers expect.
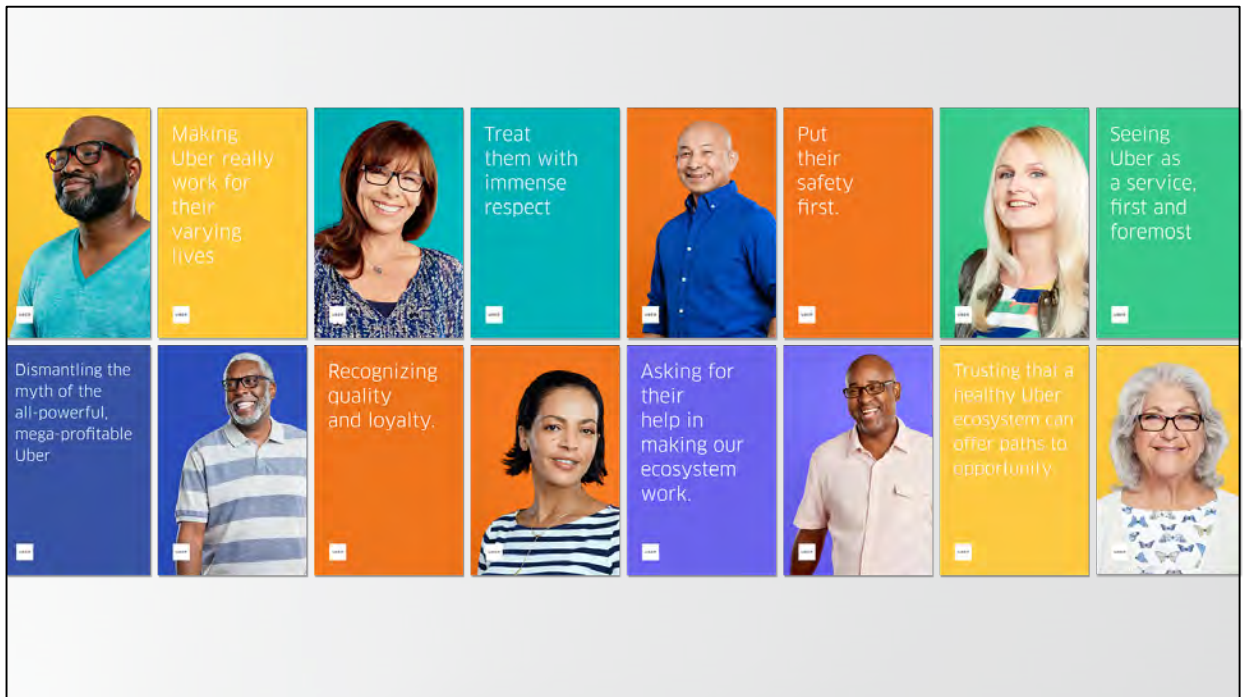
Britt to hand off to Manik

How do we make **True Partnership real?**

Manik
- Hi everyone, I'm Manik Gupta, Senior Director of Product for Marketplace and Maps
- We've just heard about True Partnership from Billy and Britt, but how do we deliver on this partnership - around the world - for our Drivers?
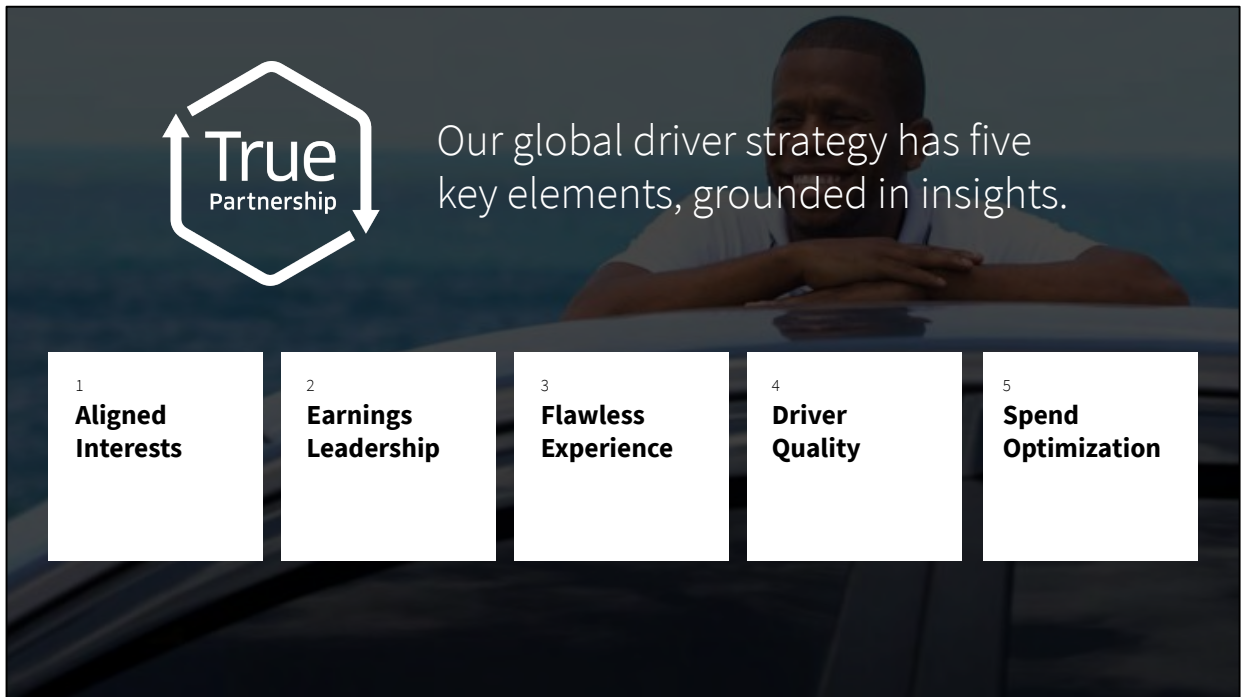
Manik
- Our driver strategy has five key elements, all grounded in deep, global insights. If you haven't checked out the pre-reading Aaron sent around, I highly recommend it. Let's walk through each element now.

1

Aligned Interests

Match driver interests, rider interests and marketplace needs with precision

Attract and motivate the right mix of full- and part-time drivers to drive consistently when and where we need them.

Reframe driver pricing to align with actual costs and benefits to the network.
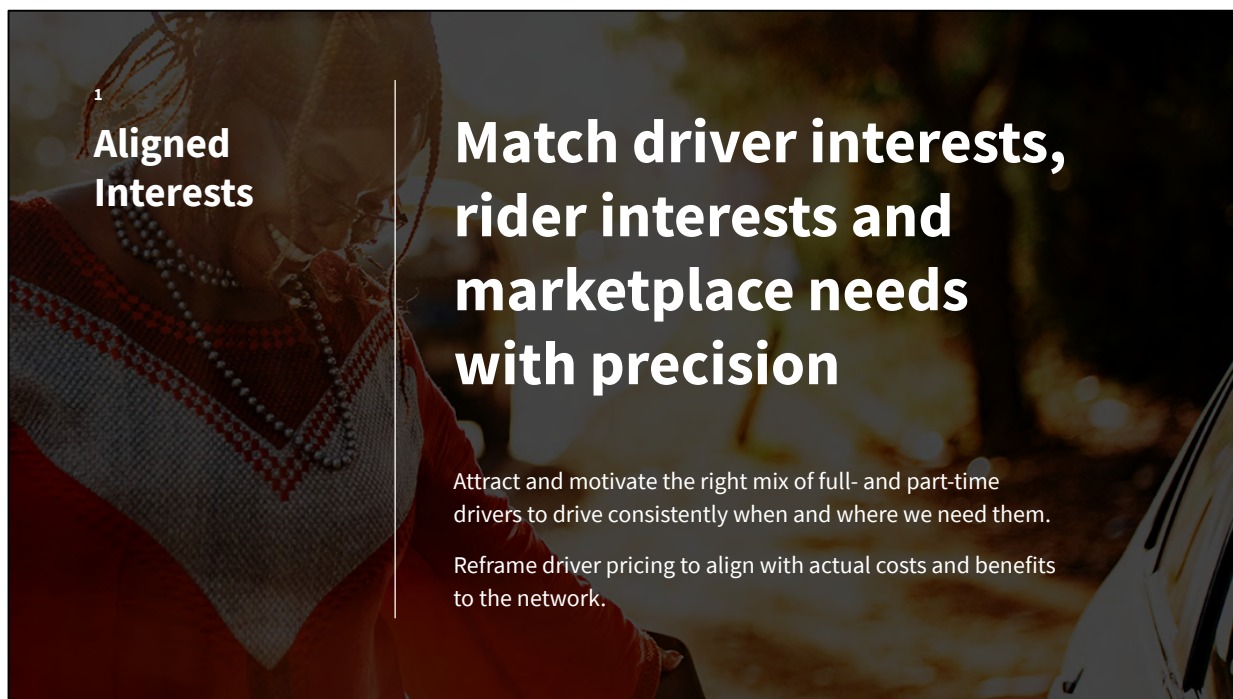
Manik
- First is Aligned Interests: to Match driver interests, rider interests, and marketplace needs with precision
- So, as one example, imagine driver pricing that more effectively rewards driver effort and going the extra mile for riders.

2

Earnings Leadership

Make Uber the most earnings-effective option for drivers

Improve driver productivity, from day one.

Ensure earnings reliability and lower drivers' costs.

Deliver on flexibility to help more people earn with more of their hours.
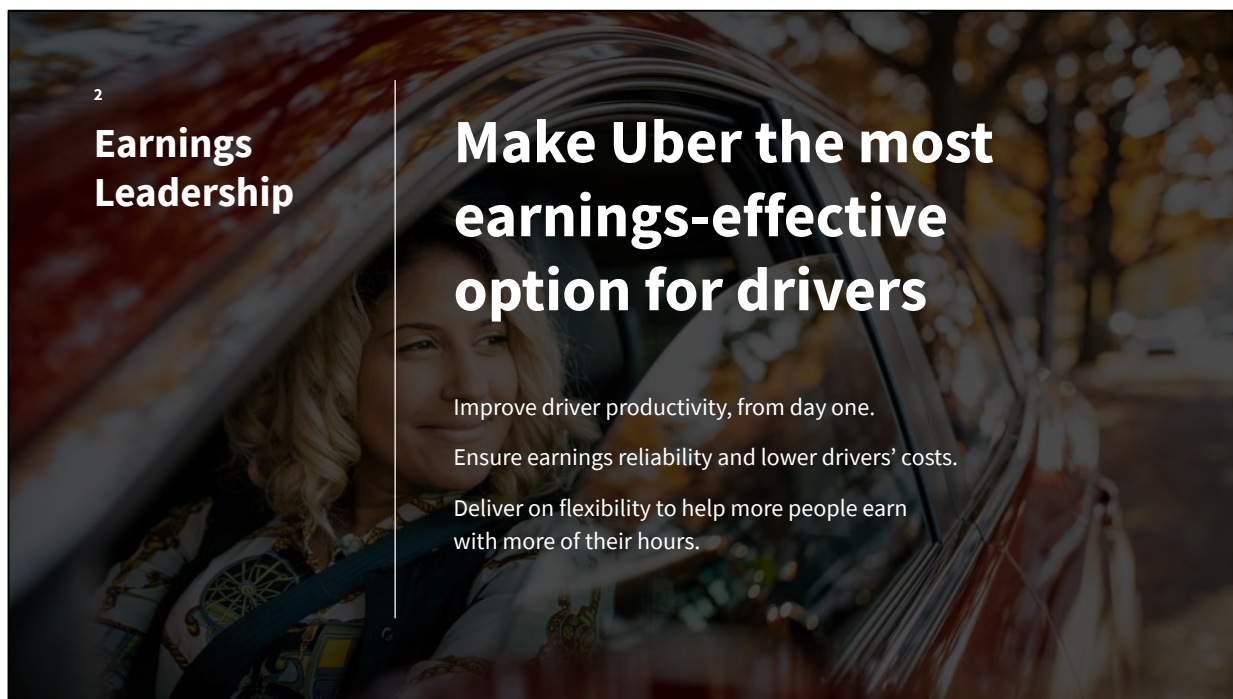
Manik
- Second is Earnings Leadership: Make Uber the most earnings effective option for drivers
- Here you could imagine smarter preferences that solve specific driver flexibility needs, without undermining marketplace health
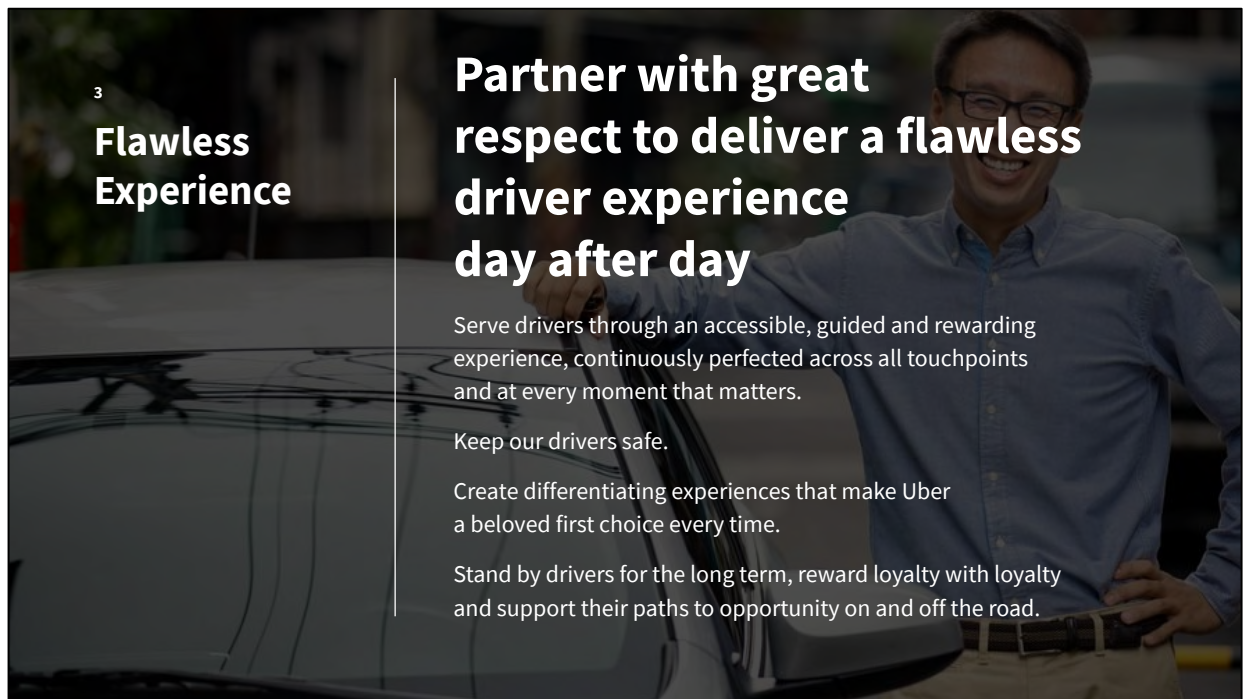
3

Flawless Experience

Partner with great respect to deliver a flawless driver experience day after day

Serve drivers through an accessible, guided and rewarding experience, continuously perfected across all touchpoints and at every moment that matters.

Keep our drivers safe.

Create differentiating experiences that make Uber a beloved first choice every time.

Stand by drivers for the long term, reward loyalty with loyalty and support their paths to opportunity on and off the road.

Manik
- Third is Flawless Experience: Partner with great respect and respect day after day
- This means...Strong commitment to driver safety - particularly in cash-heavy markets -even at the expense of growth.
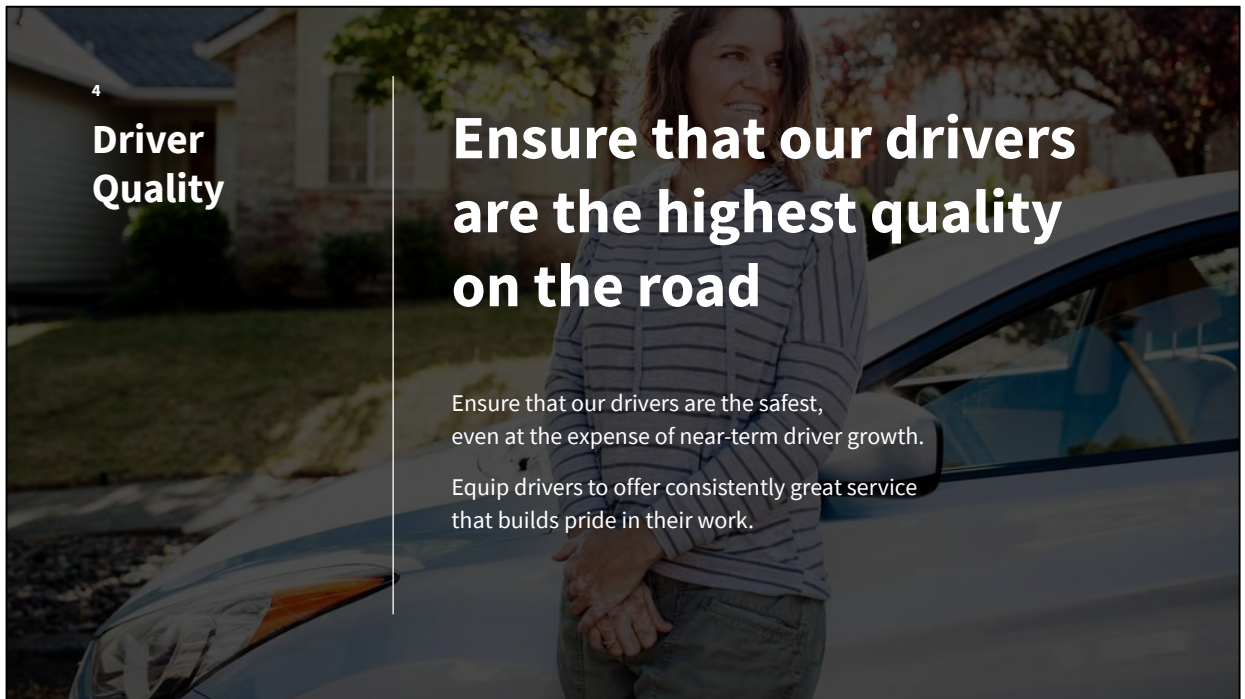
4

Driver Quality

Ensure that our drivers are the highest quality on the road

Ensure that our drivers are the safest,
even at the expense of near-term driver growth.

Equip drivers to offer consistently great service
that builds pride in their work.

Manik
- Fourth, Driver Quality: Ensure that our drivers are the highest quality on the road
- This means helping drivers understand what riders are looking for that is within their control, a safe and comfortable ride, and finding ways to reward that type of behavior.
- This strategic element creates a natural handoff and interaction with the "Quality" Pillar of Rider Forward. It's how we will help drivers deliver the consistent, comfortable ride riders need. Increasingly throughout 2018, I'm excited to see how we can collaborate even more with our Rider strategy.

5

Spend Optimization

Continuously optimize driver spend

Optimize acquisition costs, cost structures and marketplace levers and invest savings to generate more opportunity.
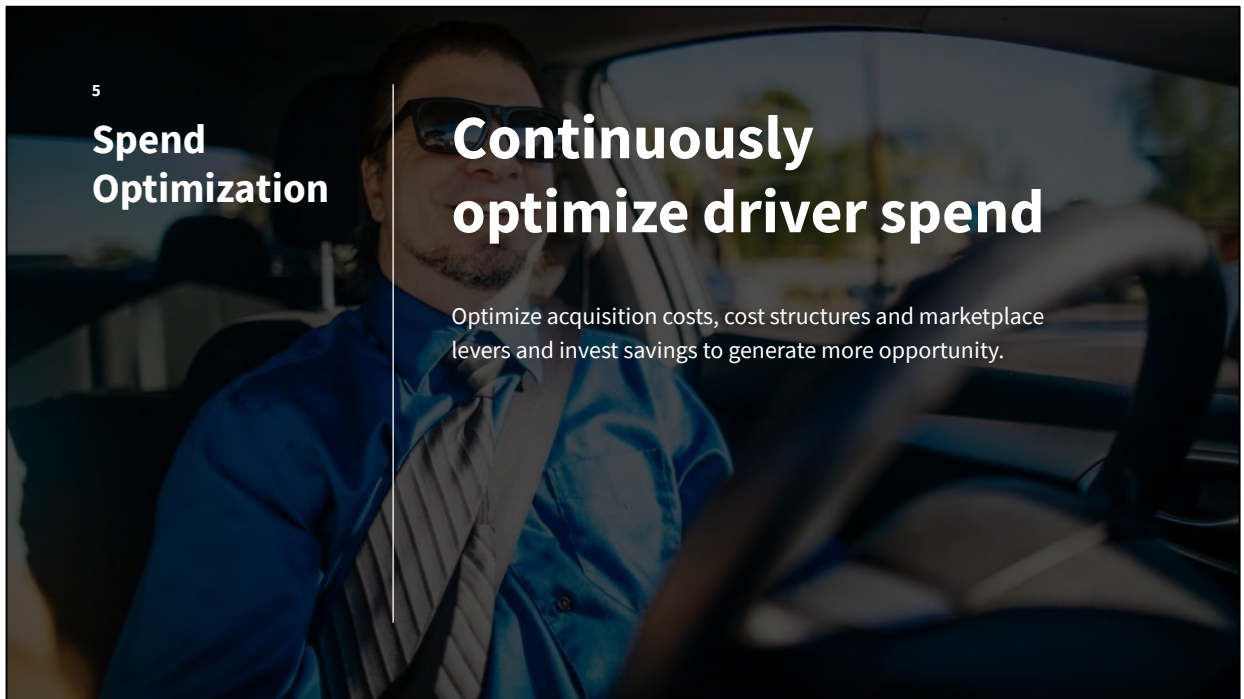
Manik
- A finally, Spend Optimization: Continuously optimize driver spend
- The more we can optimize all our costs (incentive cost, support cost, etc.), the more we can reinvest that savings into making the experience even better.

2018: True Partnership with Drivers

1
Aligned Interests

Match driver and rider interests and marketplace needs with precision

Attract and motivate the right mix of full- and part-time drivers to drive consistently when and where we need them.

Reframe driver pricing to align with actual costs and benefits to the network.

2
Earnings Leadership

Make Uber the most earnings effective option for drivers

Improve driver productivity, from day one.

Ensure earnings reliability and lower drivers' costs.

Deliver on flexibility to help more people earn with more of their hours.

3
Flawless Experience

Partner with great respect to deliver a flawless driver experience day after day.

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Stand by drivers for the long term, reward loyalty with loyalty and support their paths to opportunity on and off the road.

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Driver Quality

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Ensure that our drivers are the safest, even at the expense of near-term driver growth.

Equip drivers to offer consistently great service that builds pride in their work.

5
Spend Optimization

Continuously optimize driver spend

Optimize acquisition costs, cost structures and marketplace levers and invest savings to generate more opportunity.

Manik
- Combined, these strategic elements of True Partnership represent a much deeper strategy
- Flawless Experience - our third priority - is in essence a way of restating our H2 2017 strategy: to design, deliver, and market radical improvements to the driver experience. Which is evidence of how much more refined our thinking has become.
- But what is most exciting to me is that if we do all this, we'll make good on our partnership with drivers, and unlock massive opportunity for everyone. For drivers, for riders, and for Uber.

In 2017, we were focused
on Driver Sentiment as
our primary metric.

In 2018, we have a much more
sophisticated strategy—and,
with this, a much more
sophisticated approach to
measuring success.

Manik
- As our strategy has become more sophisticated, so too has our approach to measuring success
- We will be tracking - in partnership with a variety of teams across Tech and orgs - a variety of metrics

Measure Success: Driver Forward 2018 Key Results

Driver Strategy	KPIs	Goals (by mega-region)
Match driver interests and marketplace needs with precision	• Driver Hours • Driver First Trips • Completed / Sessions; Supply Efficiency*	• TBU • TBU • TBU
Make Uber the most earnings-effective option for drivers	• Earnings Stability • Sentiment (Earnings) • Contact Rate (Earnings)	• TBU • TBU • TBU
Partner with great respect to deliver a flawless driver experience day after day.	• Sentiment (Overall) • Contact Rate (Overall) • Market-Value Drivers % Trip Share • Driver App Reliability • 4W Retention	• TBU • TBU • TBU
Ensure that our drivers are the highest quality on the road	• Driver Ratings** • Safety Incidents	• TBU • TBU
Continuously optimize driver spend	• Cost Per First Trip • Variable Contribution Per Trip	• TBU • TBU

Pending confirmation with MP team
*** Potentially to be updated with Driver Quality as measured by Rider team blind surveys*

Our 2018
Driver Forward
strategy is
**part of the 2018
Uber strategy.**

Manik
- And our 2018 Driver Forward Strategy is part of the 2018 Uber Strategy

2018 Uber Priorities

1	2	3	4	5
Stand for Safety	**Undisputed US Rideshare & Delivery service**	**Innovate to Deliver the Lower Cost Offering**	**Earn our Customers' Love**	**Make Uber the Highest Performing Team**
Driver Quality	Aligned Interests	Earnings Leadership Spend Optimization	Flawless Experience	Driver Forward In Action
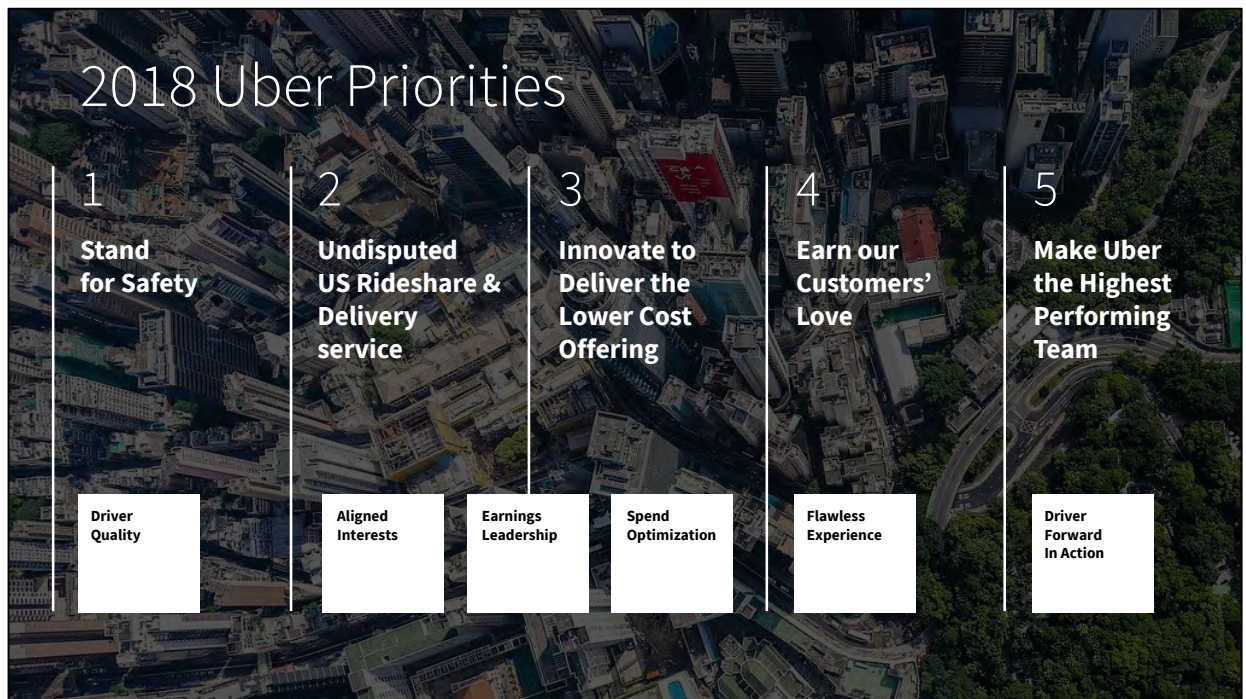
Manik

- As you can see, they ladder elegantly into our 2018 Uber Priorities
- For example Flawless Experience will clearly help us earn our customers love
- And - while we didn't list it in our driver strategy - continuing to build this global, cross-functional strategy and execution muscle - or Driver Forward in Action - is critical to making Uber the Highest Performing Team going forward

If we do all this, we
will make good on
**our value proposition
to drivers…**

Manik
- If we do all this we will make good on our value proposition to drivers…
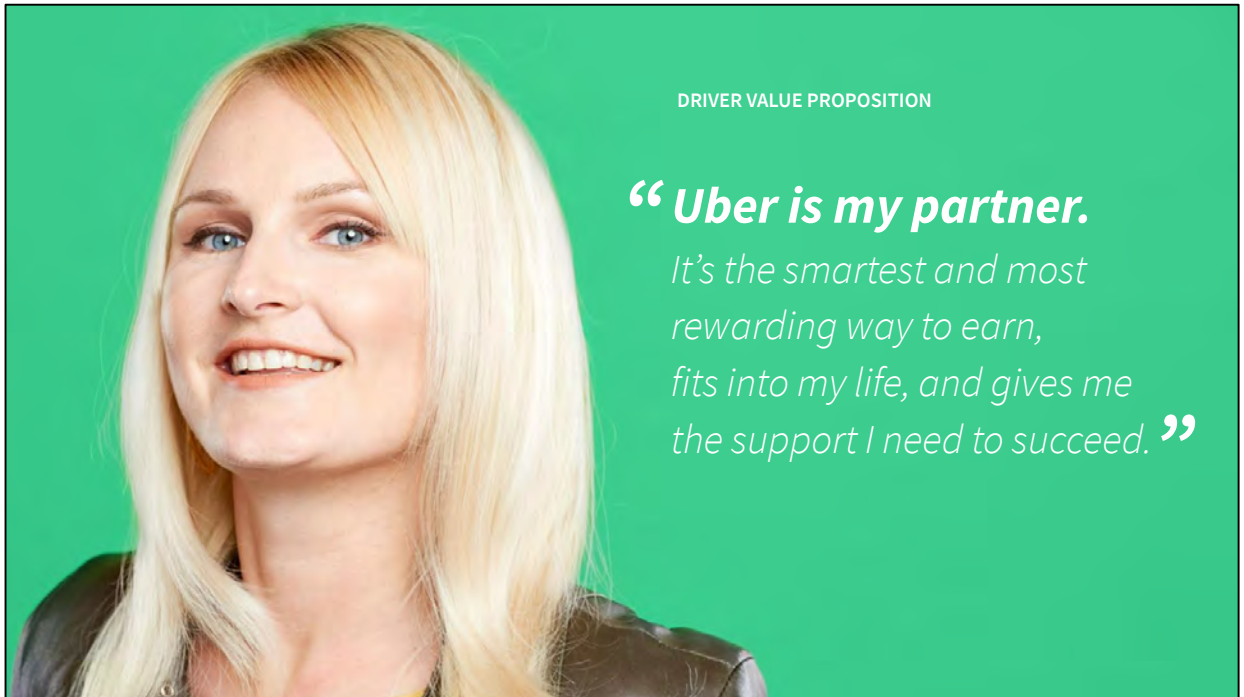
DRIVER VALUE PROPOSITION

" *Uber is my partner.*
It's the smartest and most rewarding way to earn, fits into my life, and gives me the support I need to succeed. "

Manik

- "Uber is my partner. It's the smartest and most rewarding way to earn, fits into my life, and gives me the support I need to succeed."

What is the **work we'll do to execute** the 2018 True Partnership strategy?

Manik:
- Obviously, this is really exciting, and lots more to come.
- We're in the midst of finalizing our bottoms up plans across every function, but will share high level plans shortly.

2018 Plan

In 2017 we organized our work around the core **Driver Needs.**

In 2018 we will continue to use this structure to execute against our strategy. These Needs map to our **8 Pillars.**

The 8 Pillars
of Driver Forward

TRUE PARTNERSHIP

| Access | Vehicles | Earnings | Flexibility | Safety | Stress-Free | Support | Relationship |

| Access | Vehicles | Earnings | Flexibility | Safety | Stress-Free | Support | Relationship |

The pillars for 2018
- And now I will be handing off to Abhi and Taz to cover our first pillar

| Access | Vehicles | Earnings | Flexibility | Safety | Stress-Free | Support | Relationship |

| Access | Vehicles | Earnings | Flexibility | Safety | Stress-Free | Support | Relationship |

Access
Pillar

t.uber.com/AccessinDriverAllHands
Access-Planning-Leads@

Pillar Owners
Gagan Shah
Abhishek Kumar

Hi, my name is Taz and I am engineering lead for access pillar.
Hi everyone, My name is Abhishek and I am here to talk about the access pillar.

INSIGHTS > STRATEGY > PLANNING > EXECUTION

Access: Problem Statement
View Details

Many people looking for opportunities to
earn don't realize that Uber has options
that will work for them.

If they do sign up, the onboarding process
is hard to complete and doesn't prepare
them for an early success on our platform.

What is Access: We believe that anybody who works hard has an opportunity
to earn

Today. Many people looking for…..
Source:
https://docs.google.com/presentation/d/1jOl7gHWZN2cKmVdR3MMWUjUztDo
JT33aeuHdSexG_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366_346_55

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Access: Strategy Statement
View Details

Our Vision is to provide...
instant access to a true partner committed to safety
and success.

And in this journey, we will...
Create the foundation on which true partnership is
built by providing choices, being clear and making it
easy for our partners to get on the road to success.

Pillar KPIs:
Compliance quality
Driver Sentiments
Business Impact
Defect Rate

Source:
https://docs.google.com/presentation/d/1jOl7gHWZN2cKmVdR3MMWUjUztDo
JT33aeuHdSexG_Qg/edit?ts=5a29fd02#slide=id.g2b8fe23366_346_65

INSIGHTS STRATEGY PLANNING EXECUTION

Access: Big Rocks
View Details

Compliance	Platform	Reach	Experience	Automation
Full Automated Compliance Achieve full quality compliance for all customers and cities	**Fusion** Improve engineering system health, quality and pay tech debt	**New Signup Opportunities** Reach new customers through compelling offerings and channel discovery	**Redesigned flow and system** Redesign system UX framework to deliver a clear and supported experience	**Automated Access** Automate Access that improves ease of use and reduces requirements asks and makes the process faster
Screening Excellence Transform 'Screening/BGC' systems, quality and experience to drive customer preference	**Flexible Access Platform** Create an Access platform that is flexible and scalable across geo, products and customers	**Learning and Education** Prepare, educate, and set partners up for success	**Consistent Messaging Framework** Create cohesive and consistent messaging that can be leveraged across Access	**Personalization** Optimize access by targeting and personalizing the experience for any customer
	Spend & Cost Optimization Optimize direct and indirect cost related to Access	**Reactivation & Re-onboarding** Drive growth by re-activation and by re-engaging stale signups		

Source: t.uber.com/AccessForward

How do we get there?

There are 4 dimensions that are important to us - Assurance for a driver trying to onboard with Uber, the Choice they have to earn, and the Clarity we provide through Ease of Use.

I want to highlight 3 of these big rocks today.
1. Full Automated Compliance - which about ensuring automation for all regulatory requirements across every city in the world for every driver on the road
2. Screening Excellence - which is about ensuring reliability and quality of our background checks
3. Fusion - Improving the health of our engineering systems and reducing technical debt

Vehicle
Pillar

Pillar Owners
Jahan Khanna

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Vehicle: Problem Statement
View Details

Having sustainable access to a vehicle is the biggest barrier for people to drive on Uber.

Our problem statement, unlike our products, is pretty straightforward on the Vehicles team.

Having sustainable access to a vehicle is the single biggest barrier to driving on Uber, especially in international markets where access to capital is limited.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Vehicle: Strategy Statement

View Details

We will empower our car-owning partners around the world and make it easy for anyone without a car to drive with Uber, in a sustainable way.

Pillar KPIs:

VS Driver Hours

VS Sentiment

VS Defect Rate

So we want to fix this – to make it easy for anyone without a car to drive with Uber, in a way that's sustainable for the driver, the partner, and Uber

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Vehicle: Big Rocks
View Details

Foundation	Fleets	Hourly	Rentals	Marketplace
Fusion Improve engineering system health, quality and pay tech debt	**Fleet Owner Tools** Empower Fleet Owners to manage their business efficiently and effectively in order to succeed on Uber.	**Scale US Driver Product** Enhance viability of driver hourly product and expand strategically in the US	**Integrate Large Partners** Integrate our large partners into high quality, sustainable, seamless product experiences globally, one at a time	**VS Partner Losses** Improve VS partner gross profitability by reducing losses from the Uber program
VS Data Quality Advancement of understanding our users and business impact through reliable data instrumentation.	**Fleet Earnings** Payments and collections will be a reliable, consistent and transparent experience for all owners and drivers	**Assign Global Hourly Partners** Build global launch strategy and begin execution in next priority mega-region.		**Reduce Partner Overhead** Improve efficiency of rental contract fulfillment process for new and existing Uber drivers
VS Payments Infra Ensuring partners and vehicle owners are paid reliably and scalably.	**Fleet Growth** Grow Fleets in an economically sustainable way for Owners, Drivers and Uber through clear value proposition, frictionless onboarding and activation experience.			**VS Driver Growth & Retention** Improve access to and understanding of offers to help new and existing VS drivers make better vehicle contract decisions
Multimodal Creating the building blocks for Uber to become a one-stop-shop for all urban transport				

To do this we need to get a number of things right, but I want to call out three priorities on the driver side (these don't include our rider-oriented initiatives like consumer rentals and bikes):

Alternative to Xchange leasing – As you know we've shut down Xchange leasing, but we still need a way to get drivers on the road at scale. So we're going to deeply integrate with major rental car companies in the US and Brazil so that drivers can affordably access a car with a few clicks.

Fleets – Second of all, fleets are driving more than half of our business in India and Mexico – they're critical. But our fleet products are behind Didi's, and we'll need to catch up as Didi enters those markets.

Hourly rentals – And finally, we've launched driver hourly rentals in San Francisco, and it has worked – it's the most flexible way to drive with Uber, and the cheapest source of supply in the city. We're going to scale this around the US and prepare for global expansion.

These are three of our big rocks, but we're also working to improve our payments platform, data quality, and unlock more transportation use cases, so stay tuned for some exciting announcements in 2018!

Earnings
Pillar

Pillar Owners
Tom Fallows
Arundhati Singh

We had to play catch-up on their basic requests.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Earnings: Problem Statement

View Details

Drivers feel it's "**me against Uber**" in a **fight to earn** on Uber's platform. It's a **constant, stressful** hustle just to survive.

They experience **micro-tragedies** throughout the day and week: outages, disappointment caused by unrealistic earnings expectations, losses on uneconomical trips, a rollercoaster ride due to highly-variable, black-boxy weekly incentives, unclear & confusing earnings statements, generic and tone-deaf replies from our Support team, and needlessly high operating costs & taxes.

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Earnings: Strategy Statement
View Details

Because we cannot influence absolute earnings levels, our strategy is to offer an earnings experience that feels unquestionably fair, predictable, rewarding, and stress-free and always works flawlessly.

Pillar KPIs:

Incremental Trips

Sentiment

- Earnings Overall

- Predictability

Earnings Defect Rate

INSIGHTS   STRATEGY   **PLANNING**   EXECUTION

Earnings: Big Rocks
View Details

Foundation

Infrastructure
Make flexible and extensible earnings data models and modern services/systems to offer a world-class experience today and enable rapid innovation tomorrow.

Fare Integrity
Ensure all earnings data and calculations are trustworthy, accurate, and auditable.

Zero Tickets
Eliminate the root cause of many Earnings defects, and for those that persist, enable instant self-service or high quality agent resolution.

Clarity & Comprehension
Help drivers easily understand what they are getting paid and trust it's right.

Carbon
Launch a redesigned Earnings experience in Uber's new driver app, spanning both core earnings & earnings expectations.

Fleet
[Tracking in both Earnings & Vehicles Pillars]

Fairness

Core Pricing Model
Improve Uber's core pricing model to ensure that driver earnings on every trip are aligned with driving effort.

Driver Surge
Make driver surge more trustworthy while improving Marketplace balance.

Earnings Research
Understand top factors in driver earnings (e.g. Luck vs. Skill) and impact (if any) of volatility on engagement, and KPIs to measure progress.

Predictability

Realistic Expectations
Help drivers understand and make informed driving decisions based on potential earnings at different times and locations.

Setting & Achieving Goals
Guide and support drivers to set and achieve earnings goals across sessions.

CTB to Expeditions
Clear and predictable earnings when drivers elect to complete consecutive trips.

Rewards

Reimagining DxGy
Improve the algorithms and experience behind DxGy offers to provide more consistency, choice, and transparency with driver partners.

Spend Efficiency
Improve Uber's ROI on incentive spend.

Savings

Keep More
Minimize the difference between net fare and take home pay.

Flexibility
Pillar

Pillar Owners
AJ Balance

We had to play catch-up on their basic requests.

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Flexibility: **Problem Statement**

View Details

"Flexible Earning" is Uber's key value proposition to drivers, but many drivers feel that Uber is "not really that flexible anymore."

Drivers feel that choice is still limited (especially given the aftermath of Chapter 3 and today's incentives structures), and they want to be able to better understand the impact of flexibility on their earnings goals.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Flexibility: Strategy Statement

View Details

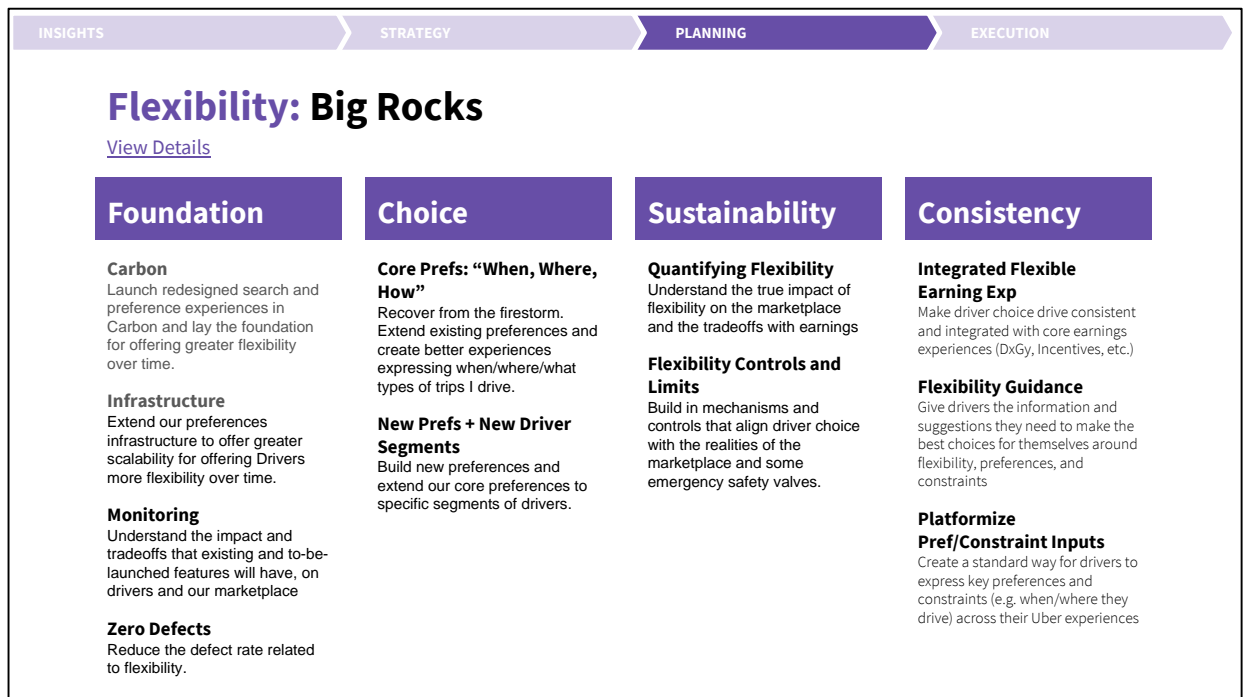# Make Uber the true "Flexible Earning" opportunity that we promise.

Give drivers an intuitive and consistent way to express their preferences and constraints, and help them make the right tradeoffs between those, their earnings goals, and the realities of the marketplace.

Pillar KPIs:

VS Driver Hours

VS Sentiment

VS Defect Rate

INSIGHTS | STRATEGY | PLANNING | EXECUTION

Flexibility: Big Rocks

View Details

Foundation

Carbon
Launch redesigned search and preference experiences in Carbon and lay the foundation for offering greater flexibility over time.

Infrastructure
Extend our preferences infrastructure to offer greater scalability for offering Drivers more flexibility over time.

Monitoring
Understand the impact and tradeoffs that existing and to-be-launched features will have, on drivers and our marketplace

Zero Defects
Reduce the defect rate related to flexibility.

Choice

Core Prefs: "When, Where, How"
Recover from the firestorm. Extend existing preferences and create better experiences expressing when/where/what types of trips I drive.

New Prefs + New Driver Segments
Build new preferences and extend our core preferences to specific segments of drivers.

Sustainability

Quantifying Flexibility
Understand the true impact of flexibility on the marketplace and the tradeoffs with earnings

Flexibility Controls and Limits
Build in mechanisms and controls that align driver choice with the realities of the marketplace and some emergency safety valves.

Consistency

Integrated Flexible Earning Exp
Make driver choice drive consistent and integrated with core earnings experiences (DxGy, Incentives, etc.)

Flexibility Guidance
Give drivers the information and suggestions they need to make the best choices for themselves around flexibility, preferences, and constraints

Platformize Pref/Constraint Inputs
Create a standard way for drivers to express key preferences and constraints (e.g. when/where they drive) across their Uber experiences

Safety
Pillar

Pillar Owners
Sachin Kansal

We had to play catch-up on their basic requests.

INSIGHTS | STRATEGY | PLANNING | EXECUTION

Safety: **Problem Statement**

View Details

Drivers feel **Uber doesn't have consistent standards** that help to keep them safe on the platform.

Drivers feel **alone when it comes to their safety**. They think Uber doesn't apply technology to proactively address issues before they become problems.

Drivers feel **Uber doesn't have their back** if they have a safety issue - they feel we lack empathy, can't be reached in a timely manner, and don't follow through.

[Gagan]

INSIGHTS   **STRATEGY**   PLANNING   EXECUTION

Safety: Strategy Statement
View Details

We will build and uphold consistent, transparent **driver safety standards**.

We will **partner with drivers** to build the tools they want and need to stay and feel safe, and we will **always have their back** with empathetic, fast and magical service.

Pillar KPIs:

Vehicle Accidents

IPCs

Safety Sentiment

Insurance Savings

[Abhishek]

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Safety: Big Rocks
View Details

Foundation

Carbon
Manage shipping of all driver safety features in Carbon

Safety Education
Educating drivers and boosting awareness about Safety features starting from onboarding

Data Platform
Build infrastructure to provide comprehensive safety and insurance data to stakeholders across the Uber ecosystem.

Telematics Platform
Building insights on driving behaviors based on unique data available to Uber

Protocol

Rider Vetting
Reducing anonymity and increasing accountability to create barriers for malicious riders

Rider Accountability
Holding current riders accountable for their behavior on the platform

Proactive

Safe Trip Intelligence
Leverage machine learning models throughout the trip lifecycle to prevent potentially unsafe trips from happening.

On Trip Safety
During every trip, riders and drivers have access to Safety Features allowing them to get in touch with loved ones, Uber and authorities

Safe Driving Products
Safe driving products to keep our drivers safe on the road

Proactive Monitoring & Detection
Build experiences, policies, tools, and processes to provide reliable, compassionate, and proactive response.

Reliable

Magical Claims
During the time of accident, provide seamless and fast claim filing experience while informing the necessary information at the right time

Critical Safety Response
Industry leading response for critical safety incidents

Stress-Free
Pillar

Pillar Owners
Maya Choksi
Yuhki Yamashita

The Stress-Free pillar is about the experience drivers have doing work on our platform

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Stress-free: Problem Statement

View Details

The experience of doing work on the Uber platform is fraught with "**micro-tragedies**"™ (TF?), which create **driver stress and frustration**, leading to **inefficiencies** and increased **costs**.

This makes it **tough for drivers to trust** and rely on Uber as a true partner that always has their back.

And as we look at our experience, there aren't just 1 or 2 really big problems - it's death by a thousand papercuts.

Our experience is filled with micro-tragedies - when the app freezes or crashes, when nav tells you to take an illegal turn, or when you accidentally tap the begin or end trip button and mis-time the trip.

All of this leads to driver stress and frustration and it's inefficient and costly.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Stress-free: Strategy Statement

View Details

In 2018, the Stress-Free pillar will deliver an always-reliable, easy-to-use experience for drivers and couriers.

We'll focus on the the **basics first** – building a strong, stable, and dependable foundation – then work to develop new solutions to **further enhance** the experience and **guide our drivers** seamlessly throughout.

Pillar KPIs:

Trip Completion Rate

Trip Defect Rate

Stress-Free Sentiment

In 2018 we want to make our experience always-reliable and easy-to-use.

This means starting with the basics first, building a solid foundation with Carbon -- and then developing features which enhance the experience and guide our drivers throughout their experience, especially when things go wrong.

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Stress-free: Big Rocks

View Details

Reliability	Ease	Recovery
App Frameworks (Carbon) Build the Uber Driver app product frameworks leveraged by program teams across Uber.	**Pickups & Dropoffs** Enable safe, stress-free, and more efficient pickups and dropoffs.	**Trip Failure Prevention** "Bumpers" that prevent common issues and flows that help drivers troubleshoot during the trip.
App Stability & Performance Maintain a reliable and performant app everywhere, on every device.	**Maps & Navigation** Integrated Maps & Navigation to help drivers and couriers work efficiently and stress-free.	**Cancellations** Improve the user experience and reduce the business cost of cancellations.
App Release Management Making the update process transparent and stress free for drivers.	**Airports & Events** Create a fair and flexible marketplace and stress-free experience at airports and events.	**Cash Experience** Make sure drivers feel safe and have Uber's support during stressful disagreements with the rider.

Beyond the foundation and key aspects of the trip experienece -- pickups, dropoffs, maps --

I want to highlight a couple of key areas of focus in 2018.

Cancellations are a $250M expense. We want to improve the experience for both riders and drivers and reduce the cost to the business.

Support
Pillar

Pillar Owners
Jai Malkani
Janelle Sallenave

We had to play catch-up on their basic requests.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Support: **Problem Statement**
View Details

Drivers encounter too many issues while driving and the burden to let us know is too high. Drivers often receive general and unempathic responses that don't fully address their very personal issues.

This makes drivers feel like Uber doesn't care about drivers or their experience.

[Gagan]

- Everybody knows about Uber. But not everyone knows that Uber has an opportunity that might work for them.
- We are in a time where we have a Flatlining of SIgnups & FTs at a 100K level (huge, but still flatlined).
- This problem is universal - across business lines, product, and markets. And the solution must also be universal - across the organization, functions, and teams.

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Support: Strategy Statement

View Details

Create a best-in-class support experience through the eyes of the Driver. We'll do this by focusing on three core pillars:

- **Frictionless**: Path of least resistance from question to answer; automate the easy stuff.
- **Personalized & Consistent**: Treat drivers as a segment-of-one, deliver the right answer every time.
- **Empathetic**: Uber deeply understands customer problems, advocates for drivers internally, and closes loops.

Drivers trust that every interaction will be amazing, and that their feedback will be used to improve experiences longer term.

Pillar KPIs:

Agent Contact Rate

Support Sentiment

Support cSAT

[Abhishek]

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Support: Big Rocks
View Details

Foundation	Frictionless	Personalized	Empathetic

Foundation

Core Tech
Core engineering excellence work to improve Bliss' reliability and scalability.

Compliance
CO handling of data meets all PII (GDPR) and financial compliance (Fidelity) obligations.

System Health
Ensure that all partner facing support systems are highly reliable.

Frictionless

Answer Discovery
Make it easy for drivers to find the right answer, increasing % issues that are self service and improving agent-support experience by getting contacts to the right agents faster.

Proactive & Self Service
Set drivers up for success through effective education and proactive outreach, Platform enabling other product teams at Uber to build self-service support experiences.

Personalized

Segmentation
Ensure our end-to-end support ecosystem can recognize a driver's relationship and status with us.

Expanded Channels
Enhance drivers' experience through full Bliss integrations for new modalities.

Contextual, Integrated Tools
Provide agents with seamless integrated context about the driver they're assisting and their issue.

Improved Agent Management
Simplify management of 30k+ agents (permissioning + data).

Empathetic

Customer Care
Improve support quality by better assessing interactions, enabling agents to practice on real issues before handling customers, and empowering PMs to use Bliss.

Support Quality
Ensure support is delivered in a timely, consistent and quality manner, resulting in high resolution and CSAT

Relationship
Pillar

Pillar Owners
Mike White
Mike Truong

We had to play catch-up on their basic requests.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Relationship: **Problem Statement**

View Details

Drivers don't feel that they're treated
fairly in their relationship with Uber.
They feel we favor riders and our own
interests over theirs.

[Gagan]

- Everybody knows about Uber. But not everyone knows that Uber has an opportunity that might work for them.
- We are in a time where we have a Flatlining of SIgnups & FTs at a 100K level (huge, but still flatlined).
- This problem is universal - across business lines, product, and markets. And the solution must also be universal - across the organization, functions, and teams.

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Relationship: Strategy Statement
View Details

Ensure that drivers feel valued, heard, respected.

Valued - recognize and appreciate drivers for their tenure and for going above and beyond. Provide benefits, perks, and rewards that demonstrate our long-term commitment to drivers as our most valuable partners.

Heard - actively seek feedback from drivers, act on that feedback, and close the loop.

Respected - establish and enforce clear standards of respect for everyone on the platform. Humanize drivers and create moments of connection that foster better interactions with riders.

Pillar KPIs:

Driver Hour Retention

Connected Trips

Relationship Sentiment

Relationship Defect Rate

[Abhishek]

INSIGHTS   STRATEGY   PLANNING   EXECUTION

Relationship: Big Rocks

View Details

Foundation

Infrastructure
Maintenance and enhancements to the systems that power all of the Relationship products

Carbon
Rolling out Carbon to 100%.

Segmentation & Personalization
Establish the canonical segmentation of our driver population so Uber teams can begin to personalize products based on data-derived attributes

Valued

Debit Card
Cash-back deal partnerships incl gas, free InstantPay, etc.

Perks & Benefits
New perks portal that creates differentiated access to benefits.

Milestones
Recognize and celebrate driver achievements on the Uber platform

In-Person
Real world interactions where Uber shows appreciation to drivers

Driver Recruiting
Formalize a Driver-Partner Recruiting strategy.

Tipping

Heard

Uber Feedback
Build better products by listening to feedback from our customers, internalizing it and closing the loop when we make changes.

Employee Empathy
Infuse customer obsession throughout the org through a series of immersion projects.

Local Driver <> Uber Connection
Create comprehensive platform for engaging with drivers that scales listening, inclusion of drivers in decision making, elevates and honors tenured drivers, and celebrates loyalty.

Respected

Profiles Experience
Win the hearts of our customers and build connection between them.

Driver Quality (Profiles <> Safety)
Improve safety perception on the platform by creating more trust between Riders and Drivers

Rider Quality
Reinforce good rider behavior and discourage bad behavior through improved feedback loops.

Ratings Anxiety
Fair and actionable rating experience.

Deactivation Experience
Improve the warning and deactivation experience for drivers by ensuring that they understand why they are being deactivated and are treated with empathy.

Global

First, let's check out **the plan in a single view...**
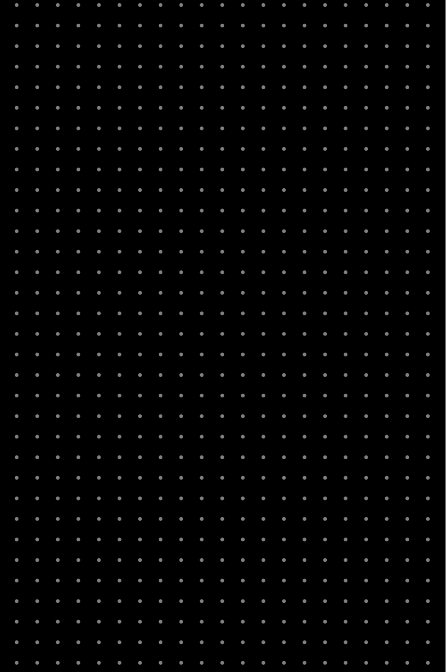
Driver Forward 2018 Global Strategy & Big Rocks

Legend:
- Access
- Vehicles
- Earnings
- Flexibility
- Safety
- Stress-free
- Support
- Relationship

True Partnership

Aligned Interests		Earnings Leadership	Flawless Experience					Driver Quality	Spend Optimization
Reduce Rental Partner Overhead	Assign Global Hourly Partnerships	VS Payments Infra	Automated Access	New Driver Experience	Redesign Flow + System	Personalization	Reactivation + Re-Onboarding	Screening Excellence	Fusion
Fleet Growth	Multimodal Platform	Fleet Earnings	Consistency Framework	Fleet Owner Tools	Earnings Narrative	Fare Integrity	Carbon	Full Automated Compliance	Spend + Cost Optimization
VS Data Quality	Integrate Rental Partners	Setting and Achieving Goals	Clarity & Comprehension	Zero Tickets	Driver Payment Reliability	Infrastructure	Carbon	Reduce Theft + Increase Collections	New Signup Opportunities
VS Driver Growth + Retention	Reimagining DxGy	Core Pricing Model	Core Preferences	Platformize Prefs + Constraint Inputs	Infrastructure	New Prefs + Segments	Zero Defects	Carbon	Flexible Access Platform
Realistic Expectations	Spend Efficiency	Keep More	Rider Vetting	Rider Accountability	Magical Claims	Critical Safety Response	On Trip Safety	Proactive Monitoring + Detection	Scale US Hourly
Driver Surge	Flexibility Controls/Limits	Flexibility Guidance	Safe Driving Products	Pickups & Dropoffs	Maps & Navigation	Airports & Events	Cash Experience	Telematics Platform	Data Platform
CTB to Expeditions	Quantifying Flexibility	Integrated Flexible Earnings Experiences	App Frameworks (Carbon)	App Stability & Performance	App Release Management	Trip Failure Prevention	Core Tech	Safe Trip Intelligence	Proactive & Self Serve
Earnings Research	Monitoring	Tipping	Answer Discovery	Contextual, Integrated Tools	Customer Care	Compliance	Expanded Channels	Safety Education	Improved Agent Management
	Cancellations		Support Quality	Segmentation	System Health	Perks & Benefits	Uber Feedback	Ratings Anxiety	
			Infrastructure	Milestones	Employee Empathy	Rider Quality	Segmentation & Personalization		
			In-Person Appreciation	Local Driver <> Uber Connection	Profile Experience	Driver Recruiting	Profile Safety		
			Deactivation Experience	Unified Driver Comms	Carbon				

Our plan is
global.

Our plan is
global.

KPIs are global and include goals for each Mega-Region

Steering Committee includes strong global and courier representation

Pillar teams include a Global Partner for each Mega-Region and, where applicable, a courier partner

From an international perspective…

Ts

Driver Obsession
Putting customers first was refreshing and engaging - and deeply aligned with the passion of our global team

Cross-Functional Strategy
Having a single, unifying strategy and objective unlocks everything else

Telling Our Story
Sharing our story of change, aligning deeply with marketing to have fewer, bigger campaigns ensures key messages breakthrough

Bs

Engagement at the Outset
Int'l needs to be involved early enough to meaningfully shape roadmaps and pillar selection, not as an afterthought

Prioritization/Clarity
Need to know where we invest geographically and what everyone can expect as a result of that prioritization (i.e. timing + roadmap commitments)

International Research
Need to know who is responsible for research in each MR, of what type, and on what timeline

Ongoing Collaboration
More communication and engagement for Int'l as plans shift and trade-offs are made - it will happen

2018 planning
has already been
**deeply
collaborative.**

Slide 173

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1   +matt.shroder@uber.com what were the dates of this event?
Andrew Macdonald; 12/13/2017 6:21:20 PM

1   November 14 and 15
Zach Smith; 12/13/2017 6:14:47 PM

2   thx
Andrew Macdonald; 12/13/2017 6:21:20 PM

All Orgs,
through **First Class**
& the Driver Summit,

have provided key input into Tech planning to ensure our thinking is grounded in global insights.

Tech's most important deliverable, **Carbon, is Global from Day 1**

PMM and ProductOps are leading an incredible, cross-functional group to share this complete app rebuild with drivers around the world.

Each Pillar is driven by a cross-functional, global team...

Pillar Owner	Functional Partners	Global Partners	Big Rock Owners
	MARKETING	US&C	BR #1
	PRODUCT OPS	LATAM	BR #2
	DATA	INDIA	BR #3
	RESEARCH	APACx	Functional Partners
	COURIER	EMEA	Functional Partners

We will track Tech work in the
Unified Product Roadmap

And HQ support is available through
Global Communities

As One.

Eng Excellence
Pillar

Pillar Owners
Akash Garg
Carl Gibbs

Hello, my name is Akash and I lead up the Driver Engineering teams. I'm going to talk about one of our big engineering initiatives for 2018. First, let's talk about the problem.

INSIGHTS | STRATEGY | PLANNING | EXECUTION

Problem Statement

A **large** (and growing) number of managed services add an increasingly large amount of **maintenance** and **upgrade** work to our teams.

Over the past year, the Driver team has seen a surge in the number of services that we need to support. Additionally, these services use a vast array of different technologies and frameworks. There isn't a common way to interface, deploy or understand them.

Costs of doing migrations such as Goldstar and All-Active are becoming

increasingly more difficult. All 100+ services need to be updated each and every time there is a new requirement or migration.

And we fully expect that 2018 will have a series of new migrations.

We simply cannot manage all of these and make meaningful progress on our product goals.

| INSIGHTS | STRATEGY | PLANNING | EXECUTION |

Problem Statement

Service health has **eroded** in 2017 despite our best efforts to incentive and reward this work.

Additionally, the health and quality of these services have suffered over the course of the year.

We track 4 key health indicators for every service we own. In 2017, despite setting goals to improve these, we

have seen a regression in our quality on all of these dimensions.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Problem Statement

Our 2018 velocity will be severely impaired unless we take immediate and concrete action towards service health and consolidation

In summary, we need to take a new approach improving our service health. Our 2018 velocity will be severely impaired unless we take immediate and concrete action towards service health and consolidation.

INSIGHTS	STRATEGY	PLANNING	EXECUTION

Strategy

Fusion

Reduce — Identify logical groupings of our services and arrive at a manageable number

Modernize — Along with Project Ark, work towards technology platform consolidation

Dedicate — Set aside explicit time and resourcing to accomplish these goals

Rails — Provide ongoing guidance and feedback to teams to ensure we maintain quality in our services

Pillar KPIs:

Operational Health

Engineering Productivity

Project Ark KPIs

Fusion is the name of our multi-quarter effort to eliminate this technical debt and lay a solid foundation for the future. There are 4 key elements to the strategy around Fusion. Reduce: Identify logical groupings of our services and arrive at a manageable number

Modernize — Along with Project Ark, work towards technology platform consolidation

Dedicate — Set aside explicit time and resourcing to accomplish these goals

Rails — Provide ongoing guidance and feedback to teams to ensure we maintain quality in our services

Carbon

Adam Gluck
Darrell Stone
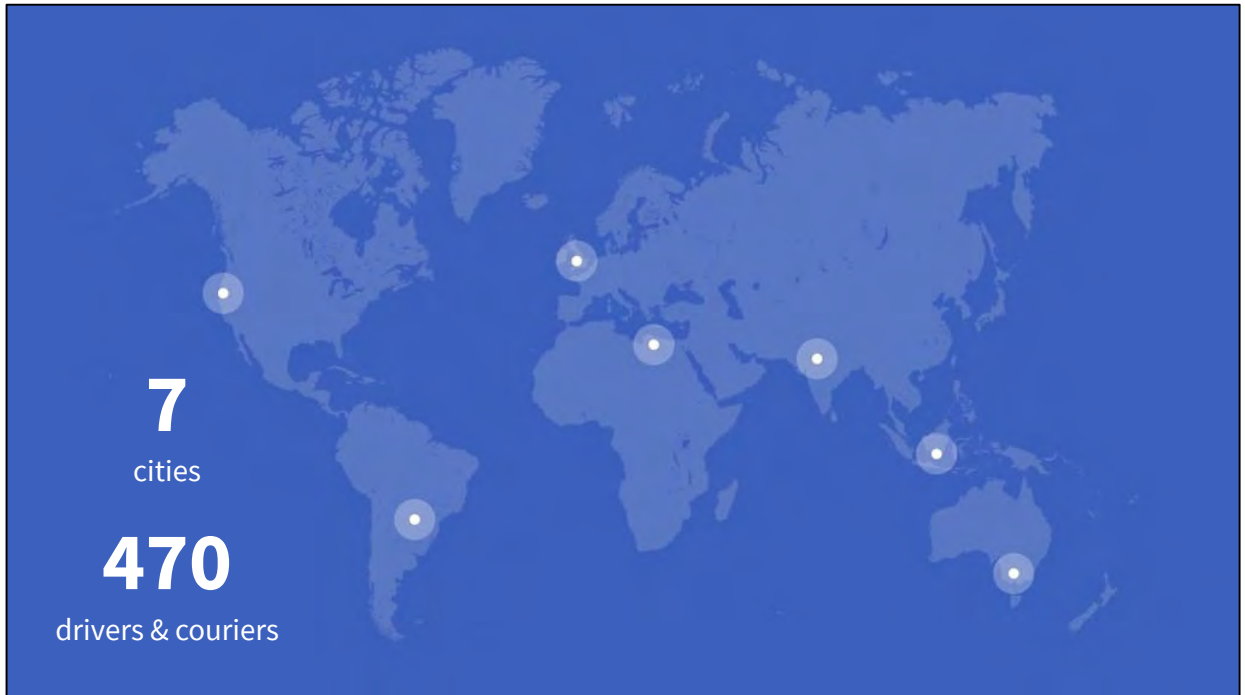
Over the past two weeks we have launched our Carbon beta in 7 cities around the world. We now have 470 drivers testing the experience and providing us with amazing feedback. Here are some of our favorite moments from the launches around the world.
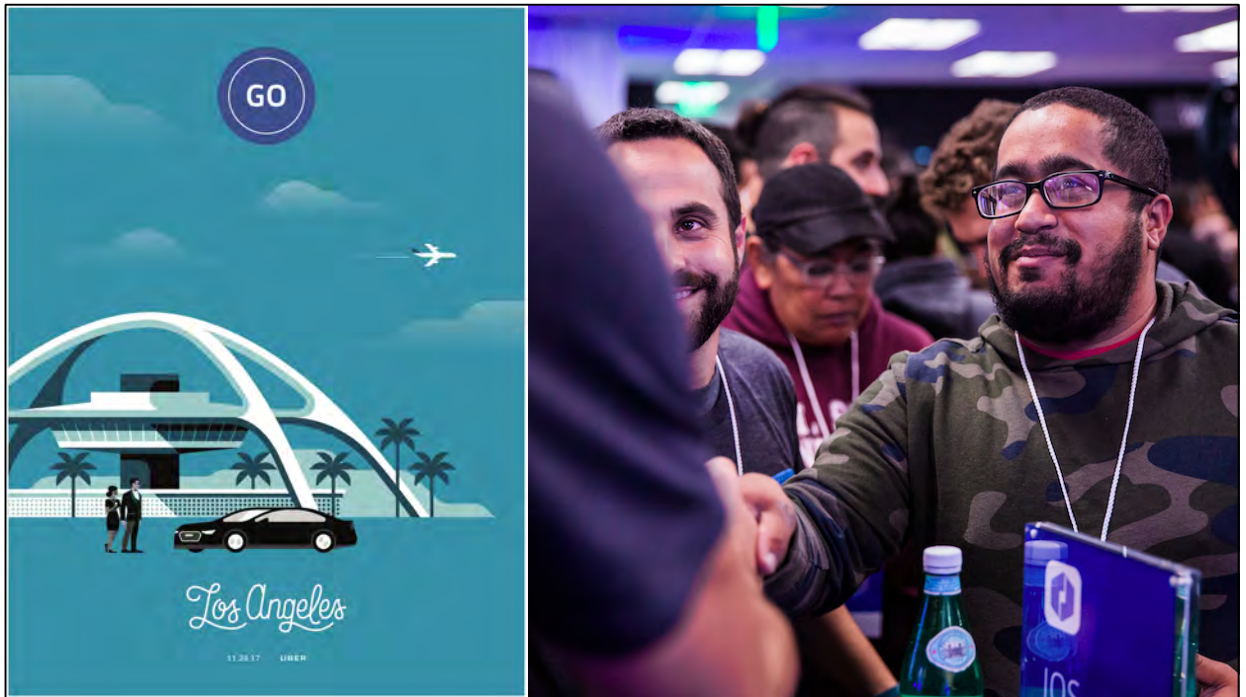
Builders welcomed Drivers - and invited to go through the download experience - on iOS …
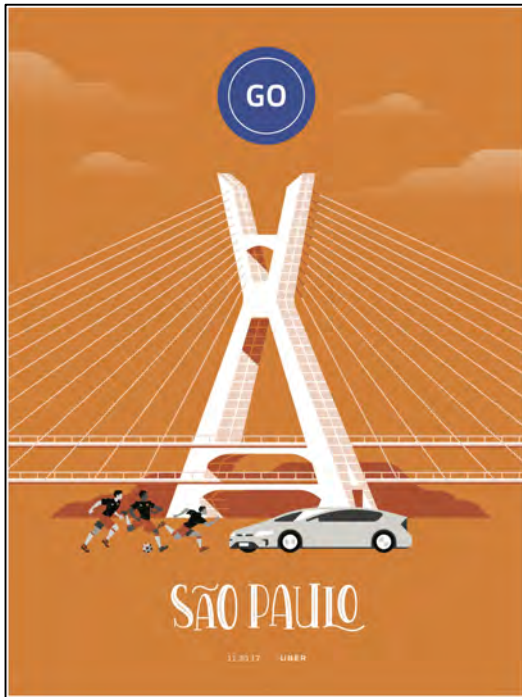
Builders welcomed Drivers - and invited to go through the download experience - on iOS …

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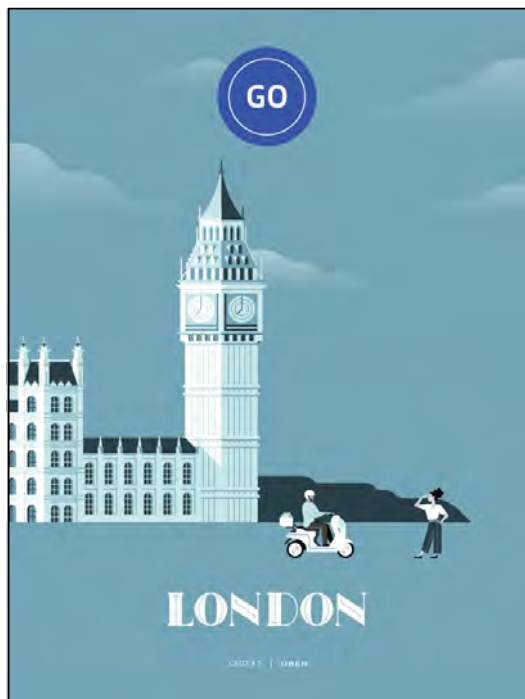
Drivers & couriers like...

Estimated time to request ("ETR")

Yoel Sumitro Moderator   1d
▸ Carbon Beta Chronicles 🔖

Joddie really loves the ETR feature. So far it has been very accurate for him. Although he only feels comfortable when the ETR is less than 5 mins. If it is more than that, he will keep driving, hoping that the ETR can decrease significantly.

One feature he really hopes for the new app is •••
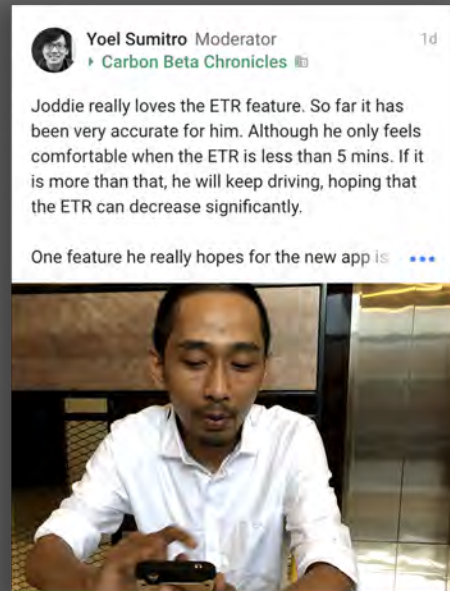
Off-trip navigation
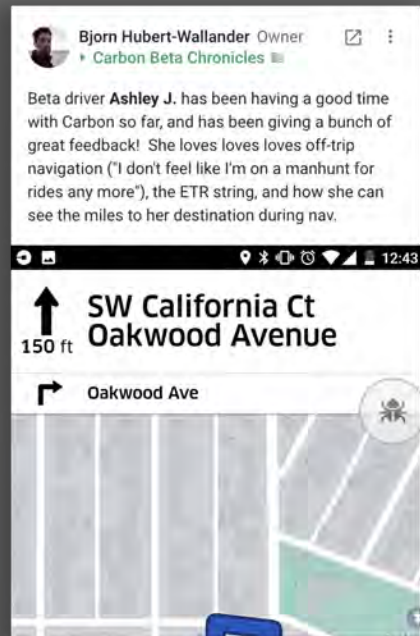
Simpler, cleaner designs

Bo Paweena A.
▸ Carbon Beta Chronicles

Meet Rebekah!
Bjorn and I had a #ridealong with Rebekah on a beautiful afternoon in LA. Since the Beta event, she went out driving with real customers and got no issues that would stop her from completing her first 4 trips on Carbon.

Overall, Rebekah is happy with the update. "Simple", "clean", and "helpful" were among words she u ...
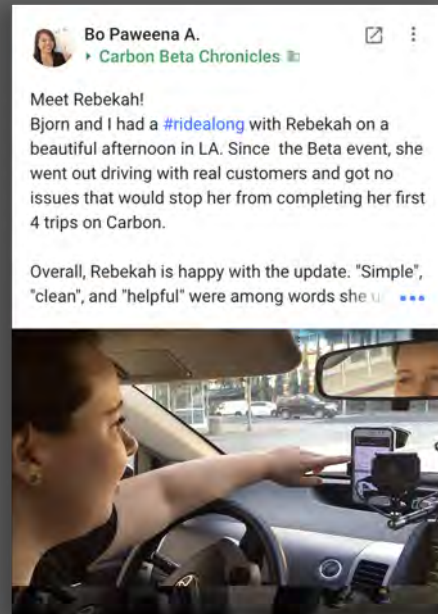
Drivers & couriers want...

Quest tracking

Dialogs, not Monologues
Providing drivers with feedback channels - and closing the loop.

Better in-app support
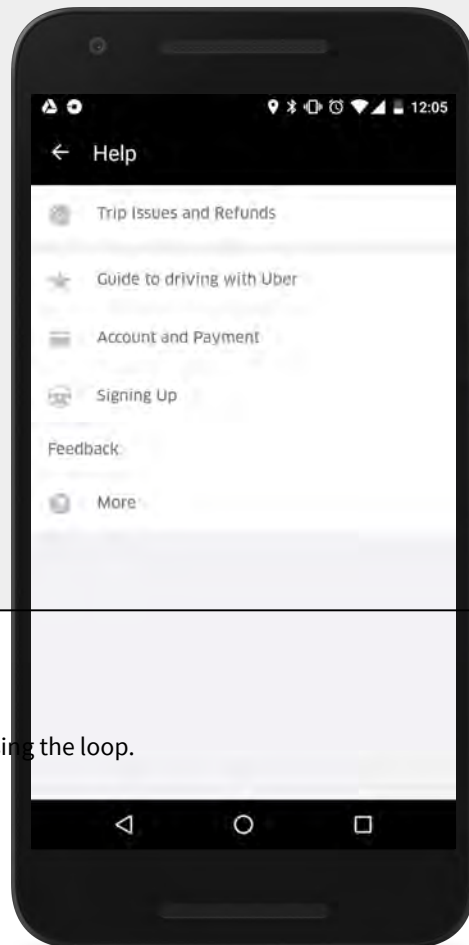
Dialogs, not Monologues
Providing drivers with feedback channels - and closing the loop.

Error-free trip flow
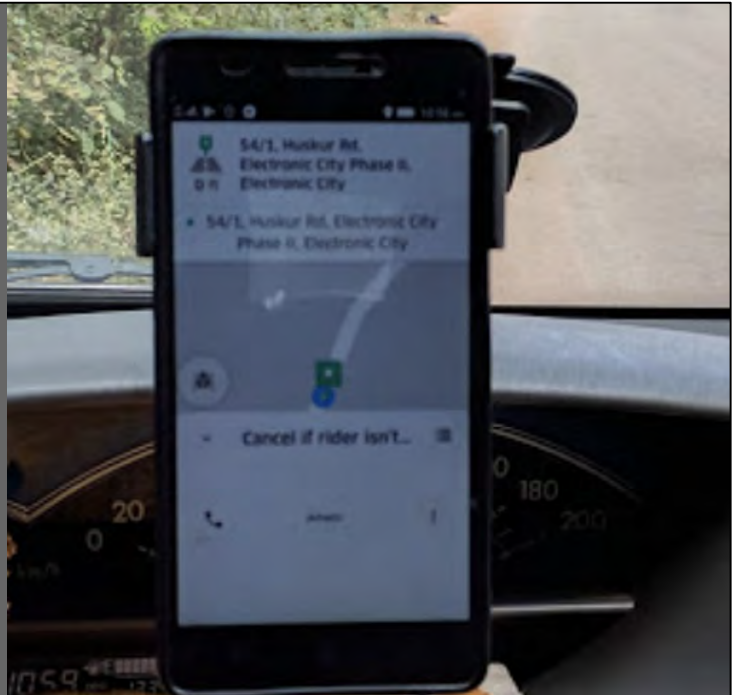
By the Numbers

18,000	66%	>99% [1]
Total Trips	Carbon Opt In	Crash Free Rate

Drivers have already completed 18,000 trips on Carbon. In terms of Uber numbers, we know this is small, but it represents a massive leap forward for us as we strive to put the final touches on the future of the Uber earning experience

Drivers have access to both Alloy and Carbon, so we are watching Carbon Opt in closely. Right now 66% globally. This is lower than we'd like but not totally surprising given some of the low level fixes we've had to make in the first few weeks (crashes, UI glitches, etc). We're optimistic this will improve, but are actively outreaching to drivers showing less engagement with Carbon to make sure we understand exactly where they are struggling.

Performance is a critical aspect of Carbon, we are proud to be at a > 99% crash free rate in the Carbon buidl drivers are currently using.

Slide 202

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1   is this true? +stone@uber.com
Yuhki Yamashita; 12/13/2017 3:36:01 PM

2   i'm asking because android
Yuhki Yamashita; 12/13/2017 3:20:04 PM

1   That's what health line showed last night with new release. Was going
to voiceover we saw some issues with crashes on android but they
appear to be resolved
Darrell Stone; 12/13/2017 3:36:01 PM

Building together

Dialogues, not
monologues

Dialogs, not Monologues
Providing drivers with feedback channels - and closing the loop.

Lunches, not Launches

Lunches, not Launches
Before scaling globally, we want to make sure we infuse the driver perspective into every layer of the Carbon experience.

Closing the loop

Carbon Release Notes

Hey Darrell,

Thanks for all the great feedback you've been sending! We're releasing a new version of the app today based on your suggestions. This version should fix a lot of the app issues you've been reporting. Thanks for putting up with these issues— we know they can be really frustrating.

Check out this week's improvements below:

- Boost zones should now show up on the map
- Driving time to destination will update faster
- Phone support is now an option (you'll find it in Help)
- Messaging riders directly in the app is now available, so you don't have to switch back and forth

Weekly Release Notes

Providing drivers with a snapshot of what's fixed and what's new

We also have professional videographer teams in each beta city - and these teams captured how the GLH event went down, but also hung around for 3 days afterwards to capture various activities including home visits (like this one in Jakarta), driver lunches, and ridealongs

Global rollout
expected to begin
Q1 2018

t.uber.com/carbon

500+ members (just call it out in VO)

Driver
Marketing
2018

In 2017, **"CHANGE"** was our core marketing concept. And **180** was our first major driver campaign (ever!)

In 2018, our second large-scale driver campaign will be **[something awesome!]** based on the strategy of True Partnership.

Stay tuned: Q1

First, who are we targeting?

New Drivers	Existing Drivers	Gen Pop & Riders
01 **Smart Growth** Efficiently acquire and groom high quality drivers-partners who will drive when and where we need them.	**02** **Experience & Relationship** Continue repairing our relationship and drive loyal preference by building trust, bringing joy and delivering high quality experiences.	**03** **Reputation** Establish Uber as a leader in the gig economy and immunize for the future.

How will our
messaging work
**across these
audiences?**

2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY
DRIVER STRATEGY	TRUE PARTNERSHIP

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY
DRIVER STRATEGY	TRUE PARTNERSHIP
CAMPAIGN CONCEPT	TBD!

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY		
DRIVER STRATEGY	TRUE PARTNERSHIP		
CAMPAIGN CONCEPT	TBD!		
KEY MESSAGES	It's the fair, flexible way to earn	It's flawless, supportive experience	I have a partner in my success

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
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2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY			
DRIVER STRATEGY	TRUE PARTNERSHIP			
CAMPAIGN CONCEPT	TBD!			
KEY MESSAGES	It's the fair, flexible way to earn	It's flawless, supportive experience		I have a partner in my success
CAMPAIGNS	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)	TBD

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
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CAMPAIGNS	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)	TBD
ON-GOING INITIATIVES	THE 8 PILLARS OF DRIVER FORWARD			

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

2018 Driver Communications Hierarchy

BRAND	OPPORTUNITY
DRIVER STRATEGY	TRUE PARTNERSHIP
CAMPAIGN CONCEPT	COMING SOON!

KEY MESSAGES	It's the fair, flexible way to earn	It's a flawless, supportive experience	I have a partner in my success

CAMPAIGNS	CARBON	DRIVER QUALITY	OPPORTUNITY (PERKS, BENEFITS, ++)	TBD

ON-GOING INITIATIVES	THE 8 PILLARS OF DRIVER FORWARD

Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship
Access	Vehicles	Earnings	Flexibility	Safety	Stress-Free	Support	Relationship

Next steps

Q1 Campaigns
(180 style without the 180 messaging)

True Partnership brief and
campaign concept development

Carbon Global Launch

Narratives for key Pillars
(Earnings, Access)

Thank you!

- Thank you to everyone for their work to bring this together.
- Thank you to Aaron for ushering us to this point and handing this off so elegantly.
- This strategy of **True Partnership** is an incredible foundation for 2018
- In 2017 we had to focus on the fundamentals - really listening to our customers and delivering on their needs.
- In 2018, **this strategy is much more sophisticated** - balancing driver needs, rider needs, and Uber's business needs. I'm excited to see this in action.
- **Forward** is how Uber ships globally, cross-functionally, cross-organizationally - let's keep refining and improving this model
- We, collectively, have the power to make a tremendous impact on our drivers globally. That's a rare opportunity in life. Let's take full advantage of it.